Implementation of Worklife Support's Well-Being Programme in the local authority-controlled education sector

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This study is a report of a five-step risk-assessment approach, using Worklife Support's Well-Being Programme, in two public-sector organisations.

The broad aims of the project were two-fold:

- To introduce an approach broadly equivalent to that of the Health and Safety Executive (HSE) Management Standards in the education sector in order to raise awareness of the areas covered by the Management Standards for Work-Related Stress.
- To demonstrate how this approach could have an impact on organisational wellbeing.

In schools, the Well-Being Programme has been shown to offer an effective risk assessment for stress. According to the end-of-programme school evaluation questionnaire, it has:

- raised awareness of the HSE Management Standards;
- raised awareness of factors that affect staff wellbeing;
- supported staff to take personal responsibility for their own wellbeing;
- encouraged an atmosphere in which staff groups feel able to contribute to the promotion of wellbeing.

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EXECUTIVE SUMMARY

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In schools, the Well-Being Programme has been shown to offer an effective risk assessment for stress. According to the end-of-programme school evaluation questionnaire, it has:
- raised awareness of the HSE Management Standards (section 3.13)
- raised awareness of factors that affect staff wellbeing (section 3.8.2)
- supported staff to take personal responsibility for their own wellbeing (section 3.8.2)
- encouraged an atmosphere in which staff groups feel able to contribute to the promotion of wellbeing (section 3.8.2)

Furthermore, according to quantitative Well-Being Programme staff-survey data (sections 3.5 and 3.6), Well-Being ratings increased across many areas of the survey for schools in both local authority contexts – in spite of the fact that there were only approximately 12 months between the two surveys.

According to participating schools responding to the school evaluation questionnaire (section 3.8.2), the impact of the programme to date has principally been on the following areas:
- school culture and ethos
- communication
- staff morale
- staff performance

The study also reports areas in which the programme has had a positive impact on the participating local authorities, Buckinghamshire County Council and Newcastle City Council.

This study describes an approach that is broadly equivalent to the HSE Management Standards for Work-Related Stress and applicable to the local authority-managed education sector. In view of the positive impact of the Well-Being Programme on the participating schools and local authorities, this study will be of interest to other schools and councils seeking to implement a Management Standards approach to stress.

The report draws on data collected from the following sources:
- Two Well-Being Programme (Organisational Self-Review Measure) surveys undertaken by participating schools, approximately 12 months apart
- An evaluation questionnaire that was sent to all participating schools
- In-depth case studies of five participating schools
- Formal interviews with the key local authority contact in each of the two participating authorities
- Sickness-absence data collected by the participating local authorities
- Informal feedback gathered at feedback consultation meetings, review meetings and facilitator network meetings

CHAPTER 1:
INTRODUCTION

1.1 WORKPLACE STRESS AND THE HEALTH AND SAFETY EXECUTIVE MANAGEMENT STANDARDS

Individuals experiencing stress exhibit a range of physical, psychological, emotional or behavioural symptoms that may be distressing, disruptive or disabling. In the workplace, stress is known to affect critical functions such as planning, decision-making, communicating effectively and maintaining high-quality relationships. The impact of an individual's stress on colleagues' workplace performance can escalate issues to the extent that they become manifest at an organisational level as a decrease in productivity and an increase in staff sickness absence, turnover, workplace accidents and the potential for litigation. This process can be surprisingly rapid where the affected individual holds a key position.

Whilst employers seeking to minimise workplace stress continue to make challenging and motivating demands of their employees, they are careful to avoid the excessive pressure that generates stress. Finding this balance requires both collective feedback, to establish best practice in the workplace, and feedback from individual employees. The latter is important because resilience to particular stressors varies from person to person and can be affected by fluctuations in physical and mental wellbeing and by demands placed on individuals from outside the workplace.

In order to support employers and employees to manage the complexities of workplace stress, the Health and Safety Executive ("HSE") launched a set of Management Standards for Work-Related Stress in November 2004. The Management Standards and the associated states to be achieved indicate a set of desirable conditions within six main areas of work: demands, control, support, relationships, role and change. Following the Management Standards approach helps employers to identify the gap between current performance and these desirable conditions and to develop their own solutions to close the gap. The indicator tool and supporting processes are intended to:
- help simplify risk assessments for stress
- encourage employers, employees and their representatives to work in partnership to address work-related stress throughout an organisation
- provide a yardstick by which organisations can gauge their performance in tackling the causes of stress

Since stress is a psychosocial rather than a physical risk, it is important that all employees are engaged in the development of workplace strategies. In this study we describe a wellbeing intervention – the Well-Being Programme from Worklife Support ("WLS") – which provides a framework for all staff to contribute to a non-judgemental, consensus-based process of improvement. The programme involves a five-step approach using data from an online audit (the Organisational Self-Review Measure or "OSRM") to raise awareness of what staff already do well to promote wellbeing and to identify areas for potential development.

1.2 CHALLENGES TO THE PROMOTION OF STRESS MANAGEMENT IN THE EDUCATION SECTOR

Figures provided by the HSE in 2003/2004 show that stress is the predominant cause of work-related illness in the education sector, with nearly 50% of all absence caused by work-related

illness being stress-related[1]. The education sector has among the highest rates of stress, depression or anxiety, with the rate of incidence nearly twice the 'all industries' average[2].

Education is therefore a particular focus for the HSE. However, the unique organisation of the sector poses a number of challenges to the introduction of the Management Standards. The principal difficulty is that the sector is composed of large numbers of small organisations – there are approximately 25,000 maintained schools in England. However there are a number of other school-related considerations:

- **Responsibility for stress management:** most schools in England are maintained by one of the 150 local authorities. Although local authorities are still the employers of most school staff, managerial responsibility is held at school level. There is often a shared responsibility for health and safety between a school's governing body and the local authority. As a result of these complex relationships, a stress-management approach is often more successful when the local authority and its schools are engaged in the process together
- **Stress management expertise:** schools have traditionally relied on local authorities for Human Resources support and may not have much HR capacity of their own
- **Gaining commitment:** schools – and headteachers in particular – deal with a large number of government-led initiatives[3]. They have been described as suffering from 'initiative fatigue'. Concerns around work overload can lead headteachers to resist committing their schools, and their staff, to any new projects unless they perceive them to be directly related to the core objectives of the school
- **Stakeholders:** there are many different stakeholders in schools (for example, unions, local authorities, parents, governors local communities and national government) so communications need to be carefully managed. The emergence of extended schools increases the numbers of stakeholders and may increase the complexity of the stakeholder relationships
- **The nature of school budgets**: school budgets are not completely flexible - some elements are ring-fenced and some require lengthy bidding processes
- **Funding:** although 90% of budgets are now devolved to schools, a 'buy back' arrangement exists whereby schools purchase back services, such as HR support, from their local authority. This arrangement can take the form of optional buy-back or 'top slicing' (whereby schools collectively agree to have their budgets top-sliced). Such arrangements are negotiated on an annual basis in line with the financial year and may impact on schools' ability to take on new projects

In order to facilitate access to schools, a partnership was set up between the HSE and WLS, an organisation with experience of engaging with schools in the promotion of staff wellbeing.

1.3 COLLABORATION BETWEEN THE HEALTH AND SAFETY EXECUTIVE AND WORKLIFE SUPPORT

WLS was established in 1999 by the national charity Teacher Support Network to work in partnership with schools, local authorities and other organisations, to encourage a focus on and investment in the health and wellbeing of all staff. To date, approximately 160,000 staff in 2,600 schools across more than 70 local authorities in the UK have participated in WLS programmes.

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[1] *Unpublished figure provided by the HSE, based on data from the Self-Reported Worker Ill-Health (SWI) survey 2003/2004*

[2] *HSE statistic sourced from www.hse.gov.uk/statistics/industry/education.htm; accessed 1 November 2006*

[3] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*

The aim of all WLS programmes in schools is to create a systemic improvement in the wellbeing of the school workforce across the UK. The Well-Being Programme has to date been the primary vehicle for achieving this.

The Well-Being Programme's survey of staff perceptions is the Organisational Self-Review Measure (or "OSRM"), which is described in Section 2.3.2 of this report. This survey looks at all of the six areas covered in the Management Standards, as well as at 'organisational culture' and 'personal wellbeing and worklife balance'. For this reason, the Well-Being Programme is one way in which schools can carry out a suitable and sufficient risk assessment for work-related stress and take an organisational approach to tackling it. The emphasis placed on wellbeing – rather than on the prevalence of stress – is viewed particularly positively by school staff. Figure 1 illustrates how the Well-Being Programme integrates with the Management Standards process.

This collaborative research project emerged from the common ground between WLS's objective to grow the Well-Being Programme and the HSE's objective to encourage greater take-up of the Management Standards approach in education. Realising that schools do not conform to traditional organisational models, the HSE recognise WLS's knowledge of and experience in the educational field and consider the Well-Being Programme an appropriate process through which to undertake the challenge of reducing stress and its impact within the educational sector.

Figure 1: Similarity between the Well-Being Programme
and the Management Standards

HSE Step	HSE Guidance	Equivalent Well-Being Stage
Step 1: Identify the hazards	The HSE Management Standards	**The areas covered by the Well-Being survey, which include the Management Standards**
Step 2: Decide who might be harmed & how	Identifying problem areas using existing data, HSE tools & other surveys	**All-staff completion of the Well-Being survey & other data collection in school**
Step 3: Evaluate the risk & take action	Communicating results & providing feedback to staff	**All-staff feedback(s) & discussion in school**
	Linking problems to solutions & running focus groups	**Involvement of staff in Well-Being meetings & workshops to generate solutions to any issues raised**
	Dealing with individual concerns	**Establishment of systems to support individual staff members**
Step 4: Record your findings	Developing action plans	**Formalisation of the outcomes of the action-planning process**
Step 5: Monitor & review	Monitoring action plans & evaluating effectiveness	**Internal progress monitoring & attendance at the collective review meeting**

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1.4 BUILDING THE BUSINESS CASE FOR MANAGING WORKPLACE STRESS

Since individuals are negatively affected by workplace stress, the moral case for stress management is obvious. The business case is not so clearly demonstrable. Although there is an increasing body of evidence for an association between wellbeing and effectiveness (for example, Tasho et al 2005[4]), demonstration of a direct link is hampered by the difficulties of setting up controlled studies - employers are understandably reluctant to split their workforce into a group undertaking a stress-management/wellbeing intervention and a control group from which the intervention is withheld. Many studies therefore seek to contribute to the build-up of evidence by linking intervention and outcome on a temporal basis.

However, the existence of a group of participating schools and a group of non-participating schools within this research project provided an opportunity to draw some comparisons. One objective of the study was to compare changes in the key performance indicator of staff absence in the group of schools participating in the Well-Being Programme with changes in levels of staff absence in schools not participating in the programme. However, schools were not chosen randomly but 'self-selected' to participate in the programme. It is important to note that there may well be confounding variables at play (for example, owing to differing methods of selection or motivations for participation). Participating and non-participating schools may not, therefore, have had precisely matching characteristics.

1.5 PARTICIPATING LOCAL AUTHORITIES AND THEIR CONTEXTS

Buckinghamshire County Council ("Buckinghamshire") and Newcastle City Council ("Newcastle upon Tyne") were selected to participate according to the following criteria:
- They had not previously engaged with the Well-Being Programme
- There was a strong commitment to the intervention from the authority's senior management
- There was sufficient capacity to engage in the programme
- There was an indication that the authority's headteachers would engage positively with the programme
- There was strong likelihood of providing a representative sample of schools in terms of sector, size and situation
- The two local authorities themselves represented different contexts (for example, one being metropolitan and one more rural)
- Each authority comprised over 100 schools, which would help ensure that the study outcomes would be applicable to both large and small authorities and that the funding available would support participation of at least 20% of the total number of schools in each authority

1.5.1 Buckinghamshire[5]

Buckinghamshire is a relatively affluent county situated in southeast England. The north is predominantly rural, with small market towns, while the south is more urban. Population density is below the national average. Average household incomes are 34% higher than the UK average. The county ranks 144th out of 150 in terms of the government indices of deprivation (where 1 is the most and 150 the least deprived). It has a generally thriving economy, with low unemployment and high levels of car ownership. Its workforce is highly skilled, with a quarter of employees educated to degree level and an above average proportion of managerial posts.

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[4] *Tasho, William et al,* Establishing the business case for investing in stress prevention activities and evaluating their impact on sickness absence. *Sudbury: HSE, 2005*

[5] *Source: Audit Commission CPA, Corporate Assessment Report 2006*

Educationally the county excels, with significantly higher-than-average pass rates at GCSE level. Residents benefit from a relatively high level of community safety, but there are small pockets of severe deprivation. 1% of people live in areas that are among the most disadvantaged in the country, creating stark contrasts within some communities.

1.5.2 Newcastle upon Tyne[6]

The city of Newcastle serves as the regional capital for a population of over two million people across northeast England. It includes a lively city centre that provides entertainment, employment and commerce for people throughout the northeast. There are affluent rural and semi-rural areas to the north and west and areas of significant deprivation in the east and inner west. The latter suffer from low housing demand, with many empty houses, high levels of long-term unemployment and low levels of educational attainment. Educational attainment in Newcastle is consistently lower than the national average; almost one in three residents has no qualifications.

Over two-fifths of the population lives in 12 wards that are amongst the most deprived 10% of wards nationally; 5 of these are amongst the most deprived 1% of wards. In 2002, some 45% of school-age children lived in these wards. Nevertheless, the quality of education in Newcastle schools is at least "satisfactory" and often "good"[7] and Newcastle has been rated by residents as among the top cities in Europe for quality of life[8].

1.6 OBJECTIVES OF THE RESEARCH PROJECT

- To implement the Well-Being Programme (an approach broadly equivalent to that of the HSE Management Standards) in two local authorities with differing contexts
- To determine the programme's effectiveness at school level by measuring change in organisational wellbeing
- To establish the impact of the Well-Being Programme on the participating local authorities
- To evaluate the capacity of the Well-Being Programme to act as a vehicle for implementation of a risk-assessment approach broadly equivalent to the HSE Management Standards approach in the local authority-managed education sector

1.7 SCHEDULE OF THE RESEARCH PROJECT

The research study began in September 2005 with local authority sign-up and ran until July 2007, by which time participating schools had begun their second "phase" of the programme, having completed their second staff survey.

Participating schools conducted their first OSRM survey in spring 2006, which they then repeated approximately 12 months later in spring/summer 2007. Throughout this report, their first OSRM survey and the ensuing period of action will be referred to as 'Phase 1' and their second will be referred to as 'Phase 2'

Further details of the timeframe are attached as Appendix 1.

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[6] *Source: Audit Commission CPA, Corporate Assessment Report 2005*
[7] *Joint Area Review for Children and Young People, Ofsted, March 2007*
[8] *Urban Audit Perception Survey, Gallup Hungary, November 2006*

CHAPTER 2:
PROCESS AND METHODS

2.1 KEY ELEMENTS OF THE WELL-BEING PROGRAMME

The Worklife Support ("WLS") Well-Being Programme is a workplace initiative comprising a basic process and set of key elements that are tailored to the specific needs of participating organisations. The programmes in Buckinghamshire and Newcastle upon Tyne were therefore similar, but not identical.

Each programme had two linked strands: within the local authority and within schools. Activities in both areas were designed to promote:
- Clarity around the purpose and ethos of the programme
- Involvement of stakeholders
- Integration with other services and programmes related to staff wellbeing
- Best use of existing skills and resources
- Opportunities to demonstrate the commitment of senior management
- Mechanisms for taking informed action
- Effective dissemination of Well-Being data and action plans

In this study, participating authorities were briefed by a WLS consultant[9], who subsequently worked with the key local authority contact and other members of the authority to design and implement the local authority strategy. Some elements of strategy planning are shown in Section 2.2, below. The WLS consultant was available to deliver regular progress reports and provide consultancy support for the programme. The latter support typically encompassed interpretation of local and national Well-Being Programme data, application of Well-Being results to policy development and ensuring sustainability of the programme.

The key elements of the Well-Being Programme in participating schools are outlined below and summarised in Figure 2, overleaf:
- Headteacher briefing(s) to encourage school sign-up
- Establishment of school "Well-Being teams", ideally comprising the headteacher (who acts as the programme's 'sponsor'), another member of the senior leadership team (who takes a more hands-on role as 'champion') and one or two 'facilitators' from the main body of the staff
- Full-day induction training for school Well-Being facilitators, offering guidance on how to achieve a high staff-participation rate in the survey, keeping up the momentum and other aspects of the team's role back in school
- Well-Being survey ("Organisational Self-Review Measure" or "OSRM") open to all staff
- Analysis of the initial ("year 1" or "Phase 1") OSRM data, with a full data profile prepared for each individual school
- Group data profile (aggregated schools' data) produced for each local authority
- A individual, face-to-face feedback consultation with every school's headteacher and facilitators to review the findings of the school's OSRM, map out the school's priority areas for development and discuss the ensuing action-planning process
- School access to online resources, including guidance materials and presentations, to support the school in the implementation of change

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[9] All WLS consultants are individuals with a sound track record in the education sector, consultancy and management. They have considerable experience of supporting organisations to improve wellbeing in the workplace

- An opportunity for a progress-review meeting with each school to maintain the momentum, review implementation and agree any remedial action required
- Follow-up ("year 2" or "Phase 2") Organisational Self-Review Measure (OSRM survey) at the end of the project to monitor progress
- Analysis of the second set of OSRM data, including benchmarking against the initial data, with a full report prepared for the school
- A second feedback consultation with each school's headteacher and facilitators to review the findings of their follow-up OSRM, evaluate their first year's impact and plan their next steps
- Termly inter-school 'facilitator network meetings' to support school-based Well-Being facilitators and enable them to share good practice

The process in schools was supported throughout by a WLS consultant. The timeframe is attached as Appendix 1.

Figure 2: Outline of one phase of the Well-Being process in participating schools
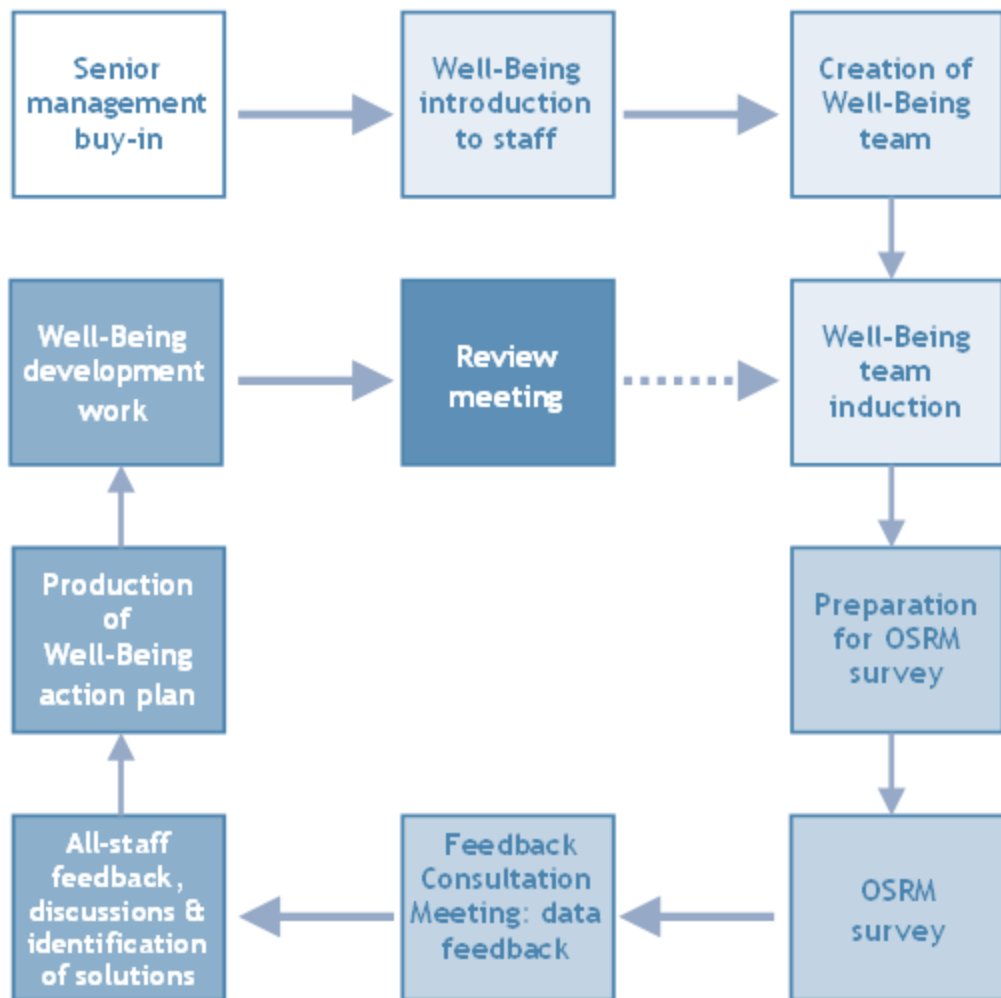
2.2 KEY STAGES OF THE WELL-BEING PROCESS IN THE LOCAL AUTHORITIES

2.2.1 Design, implementation and development of local authority strategy

WLS consultants initially approached both authorities at a senior or influential level. Consideration was given at this early stage to where the Well-Being Programme might best be

positioned within the authority. Positioning affects the level of engagement because potential participants see the level in the organisation at which responsibility lies reflecting the value attached to the intervention by senior management.

In the course of developing the local authority strategies, the following were considered:
- Overall strategy, including objectives for the Well-Being Programme and how these might be measured
- Implementation strategy
- Potential links across the authority as well as in schools (for example, in relation to Recruitment and Retention, Continuing Professional Development, Workforce Remodelling, Human Resources, Occupational Health, School Improvement Teams and Governor Services)[10] and the possible creation of a 'Well-Being steering group'
- Existing local authority resources available to support school action plans
- Communications strategy, including a plan for the dissemination of results
- How best to use the information from the authority's aggregate data (group data profiles) to inform planning
- Sustainability and development of the programme

2.2.2 School recruitment
Although the precise details of school recruitment varied between the two participating authorities (see Sections 2.2.2.1 and 2.2.2.2, below), the same outline process was followed in each authority.

Information about the Well-Being Programme and an invitation to a briefing session was produced by the WLS consultant and the key local authority contact and mailed to all headteachers in each local authority. The programme received high-level backing from within each authority and each hosted several briefings for headteachers who expressed an interest. Following these briefings, headteachers wishing to participate returned binding 'school participation forms'.

Schools were charged to participate, ensuring that the recruitment process resulted in the engagement of committed schools and enabling the funding to be spread between the maximum numbers of schools. In order to minimise the possibility that financial contribution created a barrier to participation, schools were charged on a sliding scale according to size.

Although strongly encouraged by their respective local authorities, schools were entirely free to choose whether or not to participate in the Well-Being Programme. Those that did take part are likely to have been motivated by differing factors. One of the key potential benefits of the programme that was discussed widely during the school-recruitment process was that of reduced staff absence, which may well have encouraged schools concerned about their current absence levels to put themselves forward for the programme.

2.2.2.1 Buckinghamshire
Two WLS consultants and the Buckinghamshire Director of Children's Services introduced the Well-Being Programme to Buckinghamshire headteachers at their annual conference, inviting expressions of interest in joining the project. All schools were sent letters about the programme and the key local authority contact also contacted them individually to provide further information and encouragement to participate. She also spoke to the 'Small Schools Headteacher Conference' in order to encourage wider participation amongst smaller schools.

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[10] Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector

2.2.2.2 Newcastle upon Tyne

The letter of invitation to the headteacher briefing came from a senior manager and clearly expressed local authority support for the programme. Local authority officers discussed participation with headteachers on a number of occasions, including individually. The key local authority contact was also present at headteacher briefings.

2.2.3 Creation of local authority group data profiles

After all schools had completed the Organisational Self-Review Measure (see Section 2.3.2 below), anonymised, aggregated data from each school sector (primary, secondary and special) was drawn together in a 'group data profile' for each local authority. Separate profiles were produced for the demographic group of headteachers since this demographic group is of particular interest for local authorities. To protect confidentiality, data was not reported for groups of less than five schools.

Mean values were calculated from the mean values for each school study so that each study carried equal weight in the group data profile. This ensured that large school studies did not have a disproportionate effect on the aggregate data.

Each authority received an initial and a final group data profile within the term of the research project to allow monitoring of progress in the different sectors. The final group data profiles contained data from both surveys to simplify the process of comparison.

Charts taken from these group data profiles are reproduced in Section 3 of this study to illustrate the type of data received by the participating local authorities.

2.2.4 Local authority feedback consultation

The local authority feedback consultation had a similar purpose and content to the school feedback consultation (see Section 2.3.4, below).

2.2.4.1 Buckinghamshire

Buckinghamshire's first set of aggregated data was reported to the key local authority contact and further discussed with the Senior Adviser in the School Improvement Team. Detail from the report was then shared with the schools involved and provided a basis for the development of further local authority support for its schools.

2.2.4.2 Newcastle upon Tyne

Newcastle upon Tyne's initial set of aggregated data was reported to the Head of Support for School Managers and then presented to the authority's Well-Being steering group. Members of the steering group were invited to add contextual information to be included in the local authority's interim and annual reports.

2.3 KEY STAGES OF THE WELL-BEING PROCESS IN PARTICIPATING SCHOOLS

2.3.1 Induction training

Following school sign-up, induction training sessions were held for school Well-Being team members. These provided an opportunity for participants to consider the essence of 'wellbeing', to clarify their objectives and consider their roles in the programme and to generate ideas that would support the key elements of the programme (see Section 2.1) in their schools.

A key message for participants at these sessions was the positive, non-judgemental and 'bottom-up' ethos of the programme, which aims to involve all staff. Headteachers are specifically asked to demonstrate their commitment and to give practical support, but not to drive the programme – except where issues of stress are uncovered.

2.3.2 The Organisational Self-Review Measure

Every member of staff in each participating school had access to, and was supported to use, the Well-Being Programme's confidential, online Organisational Self-Review Measure ("OSRM"). The OSRM is a survey of staff perceptions comprising 72 statements grouped into eight sections, six of which are aligned with the Management Standards for Work-Related Stress.

For each statement, the OSRM offers a range of responses from 1 to 5 on a Likert scale. A rating of 1 shows strong disagreement with a survey statement and a rating of 5 strong agreement. As all survey statements are framed positively, the higher the rating, the better the perception of performance on this measure. Overall section ratings are calculated by taking a mean of all the responses to all the statements in the section. The mean value for each statement is calculated by dividing the sum of all responses for that statement by the number of people who responded. Mean values for sections are calculated in the same way, and the overall rating, representing the health of the organisation as perceived by its employees, is the mean of all statement ratings.

Respondents are also given an opportunity to choose and prioritise, from a list of twenty 'development priorities', up to five areas of work on which they would like their school to focus within their Well-Being Programme. The rating system for the development priorities differs from the rating system employed in the rest of the OSRM. In this different system, the top two development priorities chosen by each individual receive additional weighting: every individual's first choice is given 6 points, his or her second choice 5 points, the third 3 points, the fourth 2 points and the fifth 1 point. The total number of points given to each development priority by all respondents are added together and divided by the total number of respondents in each sector category. Thus, the closer the overall rating is to 6 (the maximum), the more highly – and unanimously – a particular priority has been rated by staff.

For the purposes of data enrichment, the survey also asks a number of optional demographic questions. Responses from individuals are anonymous and, in order to protect individual confidentiality, demographic information from each part of the survey is available to the school in the data profile (see Section 2.3.3, below) only where individual demographic groups are greater than eight individuals.

Staff in each participating school carried out two online surveys over the course of the study, approximately 12 months apart, in order to measure changes in staff perception of wellbeing.

An additional statement was added to the survey in April 2006 in order to separate two elements previously contained in a single statement.

2.3.3 School data profile

A data profile is an electronically generated report produced for each participating school, containing all the data arising from that school's OSRM survey. In addition to the ratings given for each of the survey's sections and statements, ratings are also given for a number of key themes ('communication', 'team working', 'staff development' and 'health, safety and support'), which represent alternative groupings of the same OSRM statements. The profile also contains equivalent national data from a database of schools in the same sector.

Data profiles have the capacity to indicate (anonymously) whether any respondent(s) has/have given very low ratings (1 or 2 on the 5-point scale) to key statements relating to perceptions of bullying and harassment, discrimination and capacity to cope with pressures faced. Appropriate action following this type of feedback, initially discussed in facilitator training sessions, are re-

iterated in the data profile and discussed at the feedback consultation meeting described in Section 2.3.4, below.

A school's data profile is confidential to the school.

2.3.4 School feedback consultation

Headteachers and Well-Being facilitators discussed the data profile with the WLS Consultant at an in-school feedback consultation meeting within a few weeks of completing the online survey. This meeting provided an opportunity to consider the data within the school's individual context. Meeting participants also discussed:

- ways in which the data could be fed back to staff accurately and within a positive framework
- obtaining consensus for action planning
- strategies for engaging all staff
- further resources available for reference and support (guidance materials, existing case studies and further reading, largely based on best practice from Well-Being schools)
- appropriate responses to any issues of stress, bullying or discrimination indicated by the data

2.3.5 Review meeting

An individual review meeting was available to each school approximately six months after their feedback consultation to discuss action plans, goals and obstacles to progress and whether the Well-Being Programme was meeting expectations. Not all schools took up the offer of a review meeting.[11]

In Buckinghamshire, the review process was used as an opportunity to record the views of headteachers and facilitators via a questionnaire that aimed to establish initial perceptions of the programme and its impact. These written responses informed the local authority, enabling it to make decisions about future development of the programme.

2.3.6 Facilitator network meetings

Termly network meetings were held in Buckinghamshire and Newcastle upon Tyne throughout the duration of the research project. These were sessions that school Well-Being team members were actively encouraged to attend in order to share activities and outcomes with other Well-Being schools, discuss ideas for ways forward in the Well-Being process, and consolidate and celebrate achievements. They also provided an opportunity for Continuing Professional Development for Well-Being facilitators.

2.3.7 Opportunities for exchange of best practice

In addition to the local network meetings, informal telephone and email contact between the WLS consultants and school facilitators and the feedback consultation and review meetings, online case studies from other UK Well-Being schools, the national 'facilitators' forum' and termly newsletters from WLS provided further opportunities for the sharing of best practice.

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[11] *It was not possible, within the scope of this project, to assess formally any resulting impact of a school attending or not attending a review meeting. Informally, however, some schools told WLS that their review meeting had helped them to maintain the programme's momentum*

2.4 PROGRAMME EVALUATION

2.4.1 Evaluation of the programme by school participants

Questionnaires developed in collaboration with the key local authority contacts (which are attached as Appendix 2) were circulated to all participating headteachers and facilitators in July 2007.

2.4.2 Creation of school case studies

Where it was felt that aspects of an individual school's Well-Being Programme would be of help or interest to other schools designing their own programme, headteachers and facilitators were invited to contribute case studies. A WLS consultant wrote brief notes on the main areas of interest, usually at feedback consultation or review meetings, which school staff later edited and expanded on. The case studies were edited again by WLS for the purposes of consistency and returned to the school for permission to use in the study or as an online resource for other Well-Being schools. The final agreed case studies are attached as Appendix 7.

2.4.3 Evaluation of the programme by local authority participants

Information was gathered from a structured interview with each key local authority contact, which took place between May and July 2007. The WLS consultant noted down responses to the series of questions attached as Appendix 3, and the local authority contact had an opportunity to add further comments.

2.4.4 Collection of sickness absence data

The complexities of gathering accurate absence data from a collection of small organisations that employ staff with disparate working patterns are well recognised. Although authorities are required to generate specific pieces of absence data annually, there is no standard collection system.

The Well-Being Programme involves all full- and part-time staff directly employed by schools and, sometimes, casual staff (including supply personnel), irrespective of length of contract. Although both authorities supported attempts to match data-collection systems to the specific population of staff on the Well-Being Programme, in both cases data was collected from a smaller population, as described below. The effect of this may be that any changes in staff absence are under-reported.

As mentioned previously, the existence of a group of participating schools and a group of non-participating schools within both local authorities provided an opportunity to draw some comparisons. Data was collected for the period immediately preceding the project and as close as possible to the end of the programme.

2.4.4.1 Buckinghamshire

Initial attempts to collect sufficient 2005 and 2006 data for all categories of staff directly from schools were unsuccessful. Therefore, the local authority provided data from the Department for Children, Schools and Families' (formerly the Department for Education and Skills) school-census data (collected via the 618G form[12], the relevant parts of which are attached for information as Appendix 5).

The 618G database contains data relating to full-time and part-time teachers with permanent contracts or contracts longer than one month, but not to any other categories of school staff.

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[12] *Each year the DCSF contacts local authorities to request data for the annual 618G survey. The 618G form is a compulsory survey that collects data on a range of areas, including a school's total number of teachers employed, teacher vacancies, educational psychologists, levels of sickness absence and ethnicity. Data is provided to the DCSF at authority level only*

This means that the population of staff for which absence data was collected in Buckinghamshire was significantly smaller than the total population of staff involved in the Well-Being Programme. The data is based on sickness absence on working days, whether paid absence or not, and does not distinguish between stress-related and non-stress-related absence. In addition, this data is annual data that cannot be broken down into 6-month periods.

2.4.4.2 Newcastle upon Tyne

Newcastle upon Tyne also collected staff-absence data at local authority level. A new channel of data collection was set up for this project that allowed comparison of absence levels in different groups of schools over defined time periods. Data from Newcastle upon Tyne's Best Value Performance Indicator (BVPI) database, which permits the conversion of hours lost into 'full-time equivalents' (FTEs), was used in this study. This database covers all categories of staff directly employed by schools for a period of one year or more. This population of staff is, therefore, closer to the actual population of staff involved in the Well-Being Programme than is the case in Buckinghamshire. The Newcastle data was collected twice yearly. Newcastle made a particular effort to ensure the accuracy of the data collected by investing a good deal of effort into clarifying the absence-reporting process in their schools. This data does not distinguish between stress-related and non-stress-related absence.

2.5 AWARENESS OF THE HSE MANAGEMENT STANDARDS IN SCHOOLS

In order to broaden awareness and understanding of the HSE Management Standards in schools, information about the Standards and the background to the research study was given to schools:
- in the initial approach to headteachers,
- at every briefing, induction and training event
- periodically at facilitator network meetings

On the school evaluation questionnaire, circulated in July 2007, headteachers and facilitators of participating schools were asked "How well has the Well-Being Programme supported or complemented the HSE Management standards?". In Buckinghamshire, the same question was asked of headteachers and facilitators during the review process in February 2007, enabling any changes in response over time to be monitored.

CHAPTER 3:
OUTCOMES AND RESULTS

3.1 DESIGN, IMPLEMENTATION AND DEVELOPMENT OF LOCAL AUTHORITY STRATEGY

3.1.1 Positioning and funding of the intervention
3.1.1.1 Buckinghamshire
The decision to proceed with the Well-Being Programme was taken by Buckinghamshire's School Improvement Team. The key local authority contact for the Buckinghamshire Well-Being Programme was the Recruitment and Retention Strategy Manager, who was assisted from within the Workforce Development Team (which forms part of the 'Commissioning and Business Improvement' unit within Children's and Young People's Services).

Buckinghamshire were able to provide the local authority element of the funding for the research project from the grants available for Workforce Remodelling[13], utilising existing resources for staffing and providing venues for events.

3.1.1.2 Newcastle upon Tyne
The key local authority contact for the Newcastle upon Tyne Well-Being Programme was the Head of Support for School Management. Support for School Management sits in Children's Services and is closely associated with the School Improvement team. It was set up by the authority in 2001 initially to address concerns around headteacher stress. Although its focus remains on stress management and worklife balance for headteachers, it has expanded to support all categories of staff.

The authority viewed the Well-Being Programme as fully aligned with the Support for School Management resource. The alliance has been synergistic: the Head of Support for School Managers (also the key local authority Well-Being contact) was instrumental in recruiting schools to the Well-Being Programme and school engagement with Support for School Managers has actually risen over the course of the Well-Being Programme so that 65% of Newcastle schools now buy into Support for School Managers.

Local authority funding for the programme came from a number of different sources, including Workforce Remodelling, and was administered through Support for School Management.

3.1.2 Responsibility for strategic management
3.1.2.1 Buckinghamshire
Rather than establish a new steering group, Buckinghamshire decided to use existing forums with a Well-Being remit to oversee the Well-Being Programme. This avoided the need to set up another committee, which would impact on officers' workload at a time when the authority was undergoing substantial reorganisation. The programme has supported links between existing forums, including the Workforce Agreement Monitoring Group (WAMG), which has a standing wellbeing agenda item. Over time, the authority's Health and Safety sub-committee has shown an interest in the programme.

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[13] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector, including the Remodelling Agenda*

3.1.2.2 Newcastle upon Tyne

Newcastle set up a specific Well-Being steering group with senior representatives from the School Improvement Service, Human Resources, Health and Safety, Occupational Health and Governor Services. The group met once a term.

3.1.3 Definition and realisation of local authority objectives

The Well-Being Programme is tailored to the needs of each local authority, its headteachers and its schools and so has several layers of objectives. The following objectives were set for and by the participating authorities.

3.1.3.1 Buckinghamshire

Buckinghamshire saw involvement in the project as an opportunity to:
- trial the Well-Being Programme and its potential for wider roll-out within the authority
- demonstrate to schools the local authority's commitment to its staff
- reinforce messages to schools regarding staff wellbeing and worklife balance
- develop a wider understanding of the Health and Safety Executive ("HSE") Management Standards
- offer an additional incentive in the staff recruitment and retention arena
- support the policy-development work of the authority's corporate HR department

Although it is too early for the authority to have fully assessed the impact of the programme, a decision has been made to continue the programme and to widen participation. A new cohort of schools is engaging with the programme from September 2007.

There is anecdotal evidence that the authority's commitment to its staff has been appreciated, and evidence from the school evaluation questionnaire that awareness of staff wellbeing and work-life balance has increased (see section 3.8.2).

Research on the extent to which Buckinghamshire facilitators and headteachers were aware of the Management Standards and felt that they were supported by the Well-Being Programme (reported in Section 3.13) indicated that the authority's objective to broaden understanding of the Management Standards was met within this group of staff during the research period.

Informal feedback from some schools suggests a perception that retention has been supported, but no study of staff recruitment and retention figures is available to date.

3.1.3.2 Newcastle upon Tyne

Newcastle established very clear objectives that would measure the success of the project. These are summarised below. A detailed breakdown of these and how they have been measured can be found in Appendix 6.
1) To promote an ethos of staff welfare and wellbeing – demonstrating that "we mean it"
2) To promote the Well-Being Programme as a means of achieving a number of the objectives of the Education Development Plan (2002 – 2007), as outlined below
3) To promote the wellbeing of staff as a way of supporting improved achievement, as per the Newcastle School Self-Evaluation guidelines
4) To help meet the Workforce Reform[14] agenda of developing staff who are motivated and enthusiastic
5) To establish clear, specific links to the Every Child Matters[13] goals – in particular:
    a. *Be healthy*
    b. *Enjoy and achieve*
    c. *Make a positive contribution*

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[14] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*

6) To ensure that all participants understand how the Well-Being Programme will contribute to the establishment of a 'Newcastle Schools Healthy Working Lives Strategy'
7) To work in partnership with Newcastle's unique 'Support for School Managers' resource
8) To investigate any impact on sickness absence
9) To develop an evaluation of the impact on staff recruitment and retention and to consider adopting the Well-Being Programme as a form of promotion for Newcastle as an employer

Outcomes were measured either through:
- questions included in the evaluation questionnaire circulated to headteachers and facilitators at the end of the research project in July 2007 (see Appendix 2)
- tracking changes in individual Organisational Self-Review Measure ("OSRM") statement ratings between the two phases (years) of the programme
- direct measurement

3.1.4 Creation of strategic links
3.1.4.1 Buckinghamshire
Buckinghamshire is keen to ensure that the Well-Being Programme makes effective and efficient strategic links across its work as a local authority. The authority recognises the potential for stronger links being made in the future. During the structured interview with the key local authority Well-Being contact in Buckinghamshire, she was able to draw links between the programme and the National Healthy School Standard (NHSS), Every Child Matters agenda, Health and Safety requirements, the authority's Stress Working Party as well as its corporate People Strategy.[15]

The Senior Advisor, the Head of School Improvement, the Health and Safety department and the unions are all aware of the programme in Buckinghamshire. Staff wellbeing has more recently become a focus of the 'Strategic Solutions Group'. The Buckinghamshire Workforce Agreement Monitoring Group (WAMG) has it as a standing agenda item for their regular meetings and, recognising its potential, the Health and Safety subcommittee is taking an active interest in the programme.

3.1.4.2 Newcastle upon Tyne
Existing networks have been strengthened during the tenure of the programme because of joint consultation and strategic management of the programme. In addition to Support for School Managers, the teams principally engaged are those represented on the Well-Being steering group: HR, Health and Safety, Occupational Health, Governor Services and School Improvement. The programme is also viewed as a means of meeting the Workforce Remodelling 'work-life balance' agenda.[14]

Links between the local authority and its schools have been strengthened. Three local authority teams participated in the Well-Being Programme alongside the schools in order to demonstrate the commitment of the authority to the programme and to enhance the capacity of the teams to support the participating schools. These three authority teams also benefited from the opportunity to focus on their own Well-Being Programme.

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[15] Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector

3.2 SCHOOL PARTICIPATION

The initial research proposal was to work in partnership with two local authorities, each with up to 30 schools participating in the Well-Being Programme. We anticipated that this would involve 2,500 to 3,000 members of staff in total. It was hoped that the project would involve a representative sample of schools across each of the two authorities.

As outlined in section 2.2.2, participating schools were invited to self-select in both Buckinghamshire and Newcastle upon Tyne.

3.2.1 Buckinghamshire

In Buckinghamshire, 39 schools (16% of local authority-managed schools), comprising a total of 2,578 staff participated in the research project. These schools represented 11% of Buckinghamshire's primary schools, 35% of its secondary schools and 39% of its special schools.

Three schools withdrew from the project after the first year. Two other schools postponed their second survey.[16]

Data from the school-review process in Buckinghamshire indicated that the top three motivating factors for headteachers to engage with the Well-Being Programme were:
1) To enhance relationships and team working
2) To improve school culture and ethos
3) To fulfil duty-of-care obligations

3.2.2 Newcastle upon Tyne

In Newcastle upon Tyne, 26 schools (26% of local authority-managed schools) plus 3 local authority teams (comprising, in total, 1,737 staff) participated in the research project. The schools represented 23% of Newcastle upon Tyne's nursery, first, primary and middle schools, 45% of its secondary schools and 33% of its special schools.

Four primary schools did not undertake a final OSRM survey within the tenure of the study. One of these withdrew from the programme just before the final OSRM, and others encountered circumstances that caused them to postpone their second OSRM from the summer to the autumn term 2007, therefore falling outside the period of the study.

3.3 SURVEY RESPONSE RATES

Table 1, overleaf, shows the initial and final OSRM response rates for each authority overall and for different types of organisations.

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[16] *Three schools withdrew from the project after the first year: two of these recognised that embedding the Well-Being process effectively required more time and staff capacity than they were able to give at that time, given their other competing priorities; the third school felt that they had received very positive ratings from their initial survey and, given other competing budget priorities, made the decision to withdraw. Two secondary schools produced a Phase 1 action plan that extended beyond the planned project time and wanted more time to implement their actions before undertaking a follow-up survey*

Table 1: The initial and final OSRM response rates for each authority compared to national Well-Being Programme response rates

	Phase 1			Phase 2		
Overall (all schools & LA teams)	**Staff numbers**	**School numbers**	**Response rate (%)**	**Staff numbers**	**School numbers**	**Response rate (%)**
Buckinghamshire	2578	39	72.5	2 254	34	63.1
Newcastle	1737	31	75.6	1279	22	67.5
National[17]	55 615	1096	69.5	5192	97	61.9
Primary schools	**Staff numbers**	**School numbers**	**Response rate (%)**	**Staff numbers**	**School numbers**	**Response rate (%)**
Buckinghamshire	809	20	77.5	559	16	69.4
Newcastle	682	23	83.6	412	15	77..2
National	*30,148*	*820*	*77.4*	*2,425*	*66*	*69.3*
Secondary schools	**Staff numbers**	**School numbers**	**Response rate (%)**	**Staff numbers**	**School numbers**	**Response rate (%)**
Buckinghamshire	1,405	12	66.1	1,407	12	56.9
Newcastle	785	5	50.1	772	5	37.9
National	*21,275*	*185*	*61.6*	*2,292*	*18*	*50.4*
Special schools	**Staff numbers**	**School numbers**	**Response rate (%)**	**Staff numbers**	**School numbers**	**Response rate (%)**
Buckinghamshire	364	7	74.0	288	6	63.0
National	*4,192*	*91*	*69.4*	*475*	*13*	*66.0*
LA teams	**Staff numbers**	**Team numbers**	**Response rate (%)**	**Staff numbers**	**Team numbers**	**Response rate (%)**
Newcastle	175	3	55.9	n/a	n/a	n/a
National	*1321*	*34*	*66.8*			

3.4 OVERALL WELL-BEING RATINGS

The OSRM survey data allows comparison between the Well-Being ratings at the end of the study and the Well-Being ratings at the outset (see Table 2, overleaf). In terms of the overall data in both Buckinghamshire and Newcastle upon Tyne, Well-Being ratings either increased slightly or stayed the same over the course of the research project.

The ratings were calculated for each main school type. In both authorities, primary- and special-school ratings increased between Phase 1 and Phase 2. In secondary schools, however, there was no real change in the overall data. Data is not reported for special schools or local authority teams in Newcastle upon Tyne because there were less then five organisations in each group.

It is important to note that there was only a relatively short period of approximately 12 months between the two phases and that the Well-Being Programme's survey is not necessarily a sufficiently sensitive tool to pick up some of the very short-term changes in perception – particularly when looking at the data at an aggregated local-authority level. Consideration of qualitative information is therefore equally important in the evaluation of a programme of such limited duration. Neither have any external factors been taken into account that may have had an impact on the perception of the schools' staff during that period.

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[17] *National figures are based on all organisations finishing an OSRM study between January 2006 and July 2007*

Table 2: Overall Well-Being ratings by local authority and organisation type, Phase 1 and Phase 2

	Overall Well-Being ratings	
Overall	**Phase 1**	**Phase 2**
Buckinghamshire	3.66	3.70
Newcastle upon Tyne	3.69	3.78
Primary schools	**Phase 1**	**Phase 2**
Buckinghamshire	3.78	3.86
Newcastle upon Tyne	3.79	3.88
Secondary schools	**Phase 1**	**Phase 2**
Buckinghamshire	3.38	3.41
Newcastle upon Tyne	3.47	3.43
Special schools	**Phase 1**	**Phase 2**
Buckinghamshire	3.72	3.79
Newcastle upon Tyne	n/a	n/a

3.5 GROUP DATA PROFILES FOR BUCKINGHAMSHIRE

3.5.1 Sections and themes overall

OSRM 'section' and 'theme' data from Buckinghamshire (see Figures 3 to 8, below) reflects national data in the following ways:

- Well-Being ratings in secondary schools are consistently lower than those in primary schools and special schools
- The survey sections 'relationships', 'role' and 'support' generally attract some of the highest ratings in the survey
- 'Change' and 'personal wellbeing and worklife balance' are sections that tend to attract lower ratings

For participating primary, secondary and special schools, the overall data collected over the course of this research project is similar to the mean national OSRM section data for these types of school.

3.5.1.1 Primary schools

Figure 3: Overall OSRM 'section' ratings for participating
Buckinghamshire primary schools; Phase 1 and Phase 2
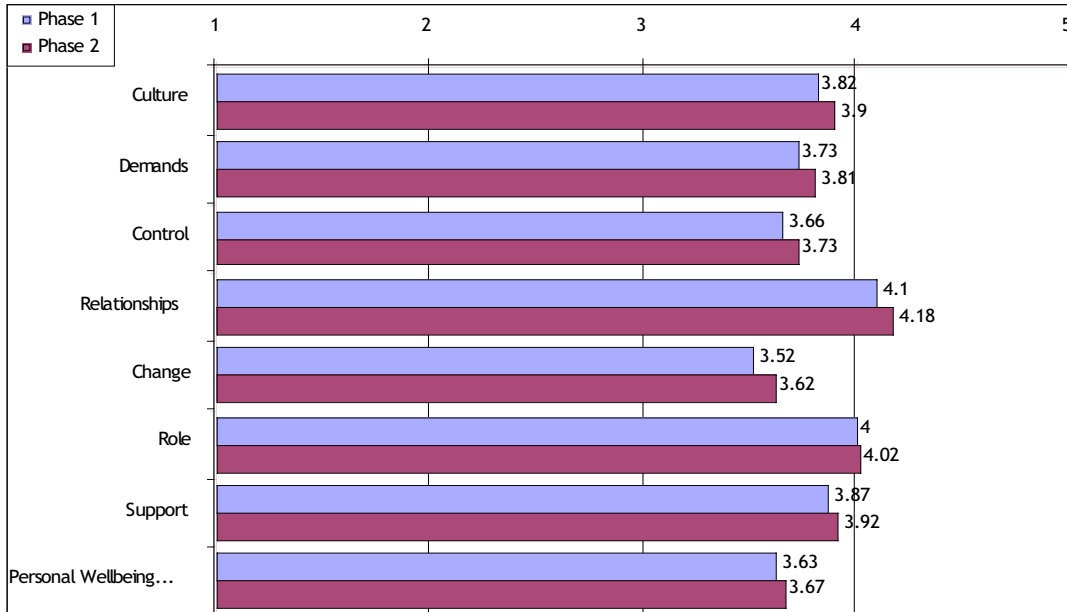
Figure 4: Overall OSRM 'theme' ratings for participating
Buckinghamshire primary schools; Phase 1 and Phase 2[18]
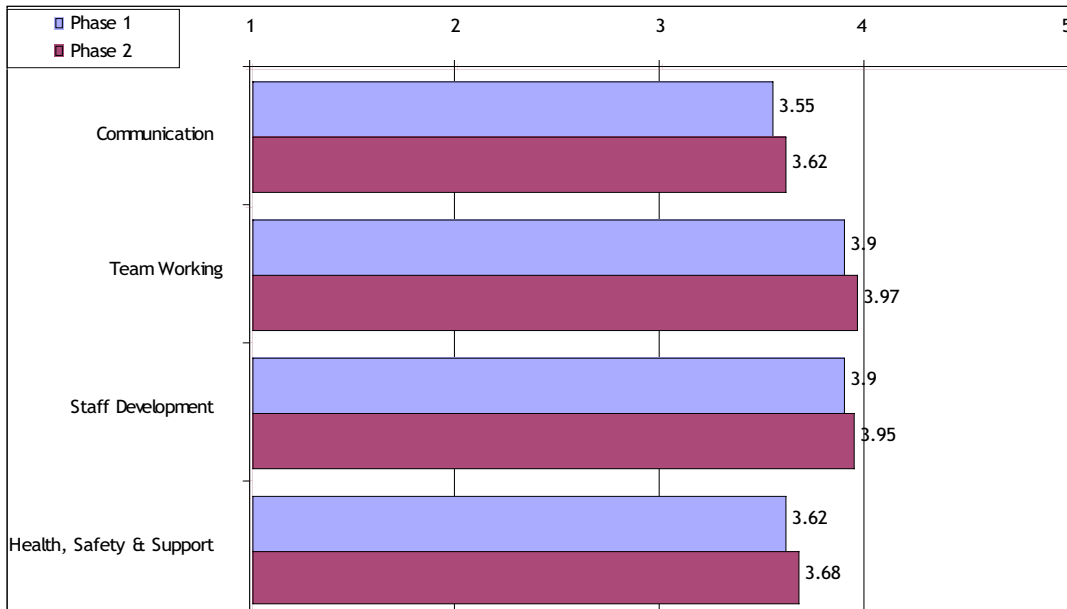
Figures 3 and 4 show that, in general, OSRM section and theme ratings rose over the course of the research project in Buckinghamshire primary schools. The area with the greatest level of

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[18] *Figure 4 shows the same survey data that is depicted in Figure 3, but here according to a number of key 'themes'. Ratings are calculated in the same way as section ratings*

increase between phases 1 and 2 was 'change', followed closely by 'culture', 'demands' and 'relationships'.

Considering the detailed Buckinghamshire data against the national data available, it is clear that:
- all overall section and theme ratings for Buckinghamshire primary school staff were above the national average in Phase 1 of the project except for in two areas: 'communication', which was exactly the same as the national average, and 'change', which was below the national average
- all overall section and theme ratings for Buckinghamshire primary school staff were above the national average in Phase 2 of the project

3.5.1.2 Secondary schools

Figure 5: Overall OSRM 'Section' ratings for participating Buckinghamshire secondary schools; Phase 1 and Phase 2
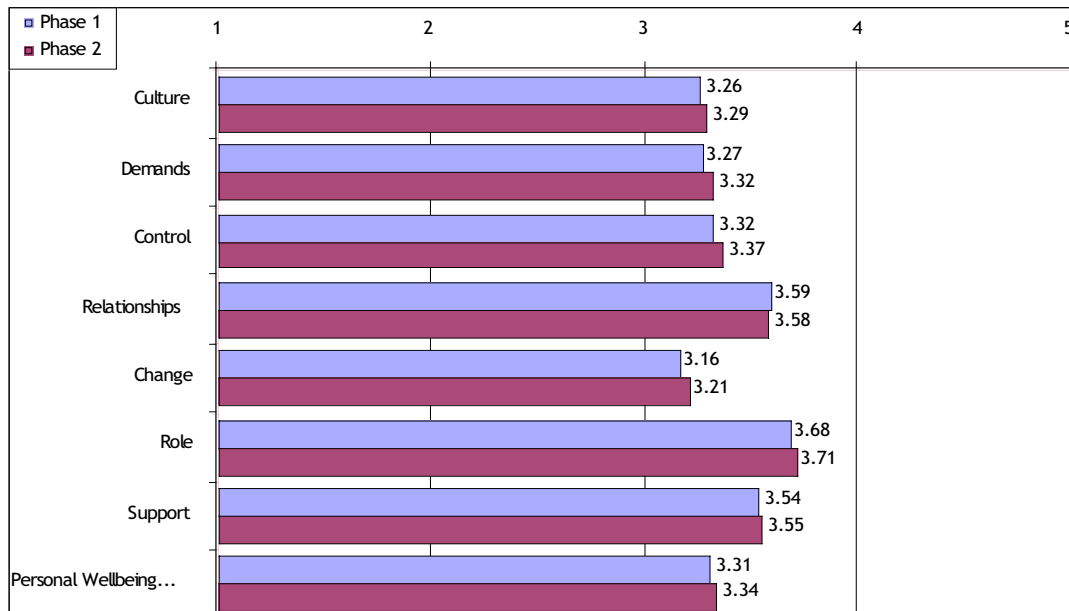
Figure 6: Overall OSRM 'Theme' ratings for participating Buckinghamshire secondary schools; Phase 1 and Phase 2
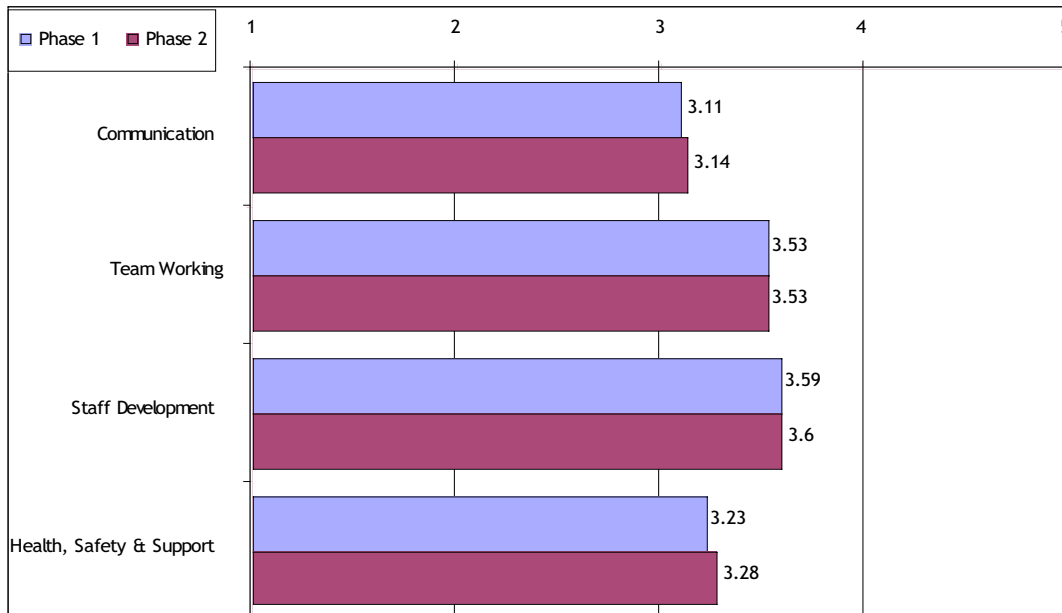
Figures 5 and 6 show that there was less change across the OSRM section and theme ratings in Buckinghamshire secondary schools than in Buckinghamshire primary schools.

In line with national findings, Buckinghamshire secondary-school staff rated every OSRM section and theme lower than Buckinghamshire primary-school staff.

Considering the detailed Buckinghamshire data against the national data available, it is clear that:

- all overall section and theme ratings for Buckinghamshire secondary-school staff were below the national average in Phase 1 of the project
- all overall section and theme ratings for Buckinghamshire secondary-school staff were above the national average in Phase 2 of the project except for in four areas: 'role', 'support', 'team working' and 'staff development', the ratings for which were exactly the same as the national averages

3.5.1.3 Special schools

Figure 7: Overall OSRM 'section' ratings for participating
Buckinghamshire special schools; Phase 1 and Phase 2
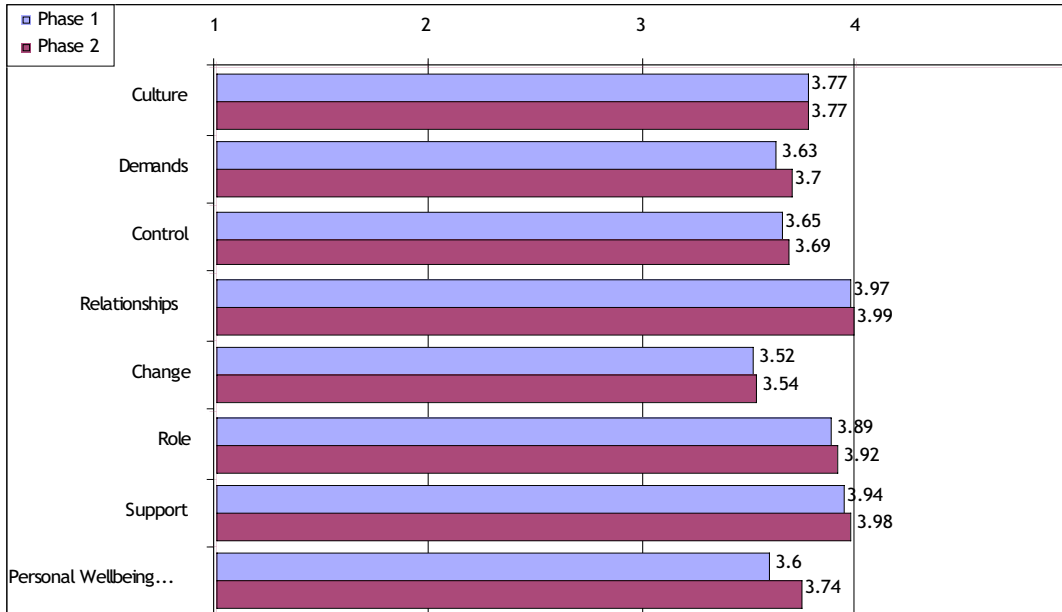
Figure 8: Overall OSRM 'theme' ratings for participating
Buckinghamshire special schools; Phase 1 and Phase 2
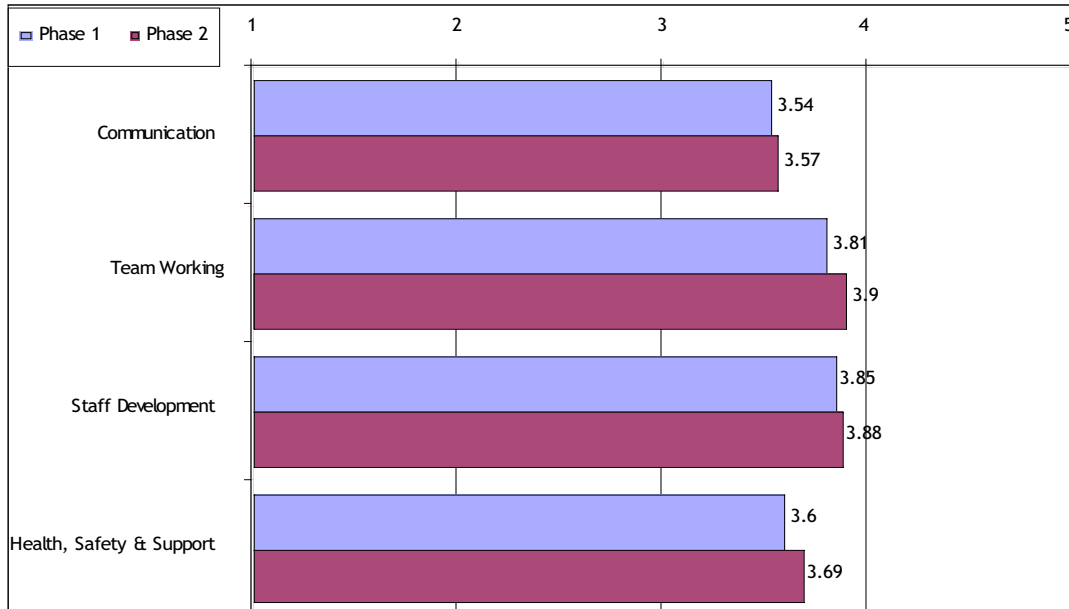
For Buckinghamshire special schools (see Figures 6 and 7), the areas with the greatest level of increase between phases 1 and 2 were 'demands', 'personal wellbeing and worklife balance', 'team working' and 'health, safety and support'.

Comparing the detailed Buckinghamshire data with the national data available:
- ratings given by Buckinghamshire special-school staff for the three sections of 'relationships', 'change' and 'support' were above the national average in Phase 1 of the project; the rating for 'culture' was the same as the national average
- all other section and theme ratings for Buckinghamshire special school staff were slightly below the national average in Phase 1
- ratings given by Buckinghamshire special-school staff for the two sections of 'demands' and 'personal wellbeing and worklife balance' and the theme of 'health, safety and support' were above the national average in Phase 2 of the project; the rating for the 'support' section exactly matched the national average
- all other section and theme ratings for Buckinghamshire special-school staff were slightly below the national average in Phase 2

3.5.2 Changes in statement outcomes

Analysis at statement level reveals that a particular group of statements, all of which are related to perceptions of work pressure, appear consistently amongst those to show the greatest levels of positive change across all three school types between the two phases of the programme – a picture that is shared with that of Newcastle-upon-Tyne (see Tables 15 and 17 on page 33). These statements are: 'I seldom feel overloaded by my work', 'I am able to take sufficient breaks during the course of my working day', 'I seldom feel under unreasonable pressure at work' and 'I am able to decide the pace at which I work'.

3.5.2.1 Primary schools

Table 3: The five statements to receive the greatest increases in ratings overall in participating primary schools in Buckinghamshire between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	We are kept well informed about the plan and timetable for change and how the changes might affect us individually	+8.6
2	I seldom feel overloaded by my work	+8.3
3	There is good, open communication between managers and other staff	+8.1
4	I am able to take sufficient breaks during the course of my working day	+7.6
5	The effects of change are closely monitored and, where necessary, adjustments are made	+7.5

Table 4: The three statements to receive the greatest decreases in ratings overall in participating primary schools in Buckinghamshire between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	I have the skills and training to do my job well	-1.5
2	I am less stressed than my colleagues	-1.2
3	I enjoy my job immensely	-1.0

3.5.2.2 Secondary schools

Table 5: The five statements to receive the greatest increases in ratings overall in participating secondary schools in Buckinghamshire between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	I seldom feel overloaded by my work	+7.5
2	I receive adequate health and safety training	+7.5
3	I am able to take sufficient breaks during the course of my working day	+7.4
4	I seldom feel under unreasonable pressure at work	+5.2
5	There is a real interest in the welfare and wellbeing of the people who work here	+4.5

Table 6: The three statements to receive the greatest decreases in ratings overall in participating secondary schools in Buckinghamshire between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	There are things about working here that make me want to stay	-2.3
2	I am not harassed, bullied or victimised	-2.0
3	At work, I am less stressed than 12 months ago	-1.4

3.5.2.3 Special schools

Table 7: The five statements to receive the greatest increases in ratings overall in participating special schools in Buckinghamshire between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	I seldom feel under unreasonable pressure at work	+6.5
2	I am able to decide the pace at which I work	+6.0
3	I am less stressed than my colleagues	+5.7
4	My personal life does not adversely affect my work life	+3.5
5	All in all, my quality of life is very good	+3.5

Table 8: The three statements to receive the greatest decreases in ratings overall in participating special schools in Buckinghamshire between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	There is good, open communication between managers and other staff	-10.9
2	There is a real interest in the welfare and wellbeing of the people who work here	-9.2
3	I am able to take sufficient breaks during the course of my working day	-8.9

3.5.3 Development priorities by school type

In the Well-Being Programme's survey of staff perceptions, staff were asked to choose five priorities from a possible 20 and to rank these in order of importance. Chosen priorities are given a rating that reflects the order of preference.[19]

The areas of workload, creating closer links between managers and other staff and developing a clear and shared direction are the most consistent development priorities to emerge across participating Buckinghamshire schools.

3.5.3.1 Primary schools

Table 9: Top three 'development priorities' in participating primary schools
in Buckinghamshire, Phase 1

Rank	Development priority	Rating[13]
1	Improve consultation on the decisions that affect us	1.57
2	Improve and balance workloads	1.37
3	Create closer links between managers and staff	1.29

Table 10: Top three 'development priorities' in participating primary schools
in Buckinghamshire, Phase 2

Rank	Development priority	Rating
1	Develop a clear and shared idea of what we are trying to achieve	1.41
2	Improve consultation on the decisions that affect us	1.39
3	Improve and balance workloads	1.28

The top two priorities listed in Table 9, above, (relating to consultation and workload management) also emerged within the top three development priorities for staff working in participating primary schools in Phase 2 (see Table 10). In Phase 2, however, 'Develop a clear and shared idea of what we are trying to achieve' was rated more highly – a development priority that doesn't appear in the top three in Phase 1.

On closer inspection of the Buckinghamshire primary-school survey data by role group, support staff working outside the classroom rated 'Develop a clear and shared idea of what we are trying to achieve' as their top priority in both phases. In contrast, support staff working in the classroom felt a strong need for additional training and development. Teachers working inside the classroom chose the statement concerning workload as their top priority for development in both phases of the research project. When looking at the same data according to management status, both senior managers and other managers prioritised 'Improve and balance workloads' in both phases, whereas non-managers rated 'Improve consultation on the decisions that affect us' as most important in both phases.

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[19] *The rating system for the development priorities differs from the rating system employed in the rest of the Well-Being Programme's survey of staff perceptions. In this different system, the top two development priorities chosen by each individual receive additional weighting: every individual's first choice is given 6 points, his or her second choice 5 points, the third 3 points, the fourth 2 points and the fifth 1 point. The total number of points given to each development priority by all respondents have been added together and divided by the total number of respondents in each sector category. Thus, the closer the overall rating is to 6 (the maximum), the more highly – and unanimously – this priority was rated by staff*

3.5.3.2 Secondary schools

Table 11: Top three 'development priorities' in participating secondary schools in Buckinghamshire, Phase 1

Rank	Development priority	Rating
1	Improve and balance workloads	1.54
2	Improve the physical environment	1.39
3	Create closer links between managers and staff	1.36

Table 12: Top three 'development priorities' in participating secondary schools in Buckinghamshire, Phase 2

Rank	Development priority	Rating
1	Improve the physical environment	1.66
2	Improve and balance workloads	1.42
3	Create closer links between managers and staff	1.28

The top two development priorities for participating secondary-school staff in Phase 1, shown above in Table 11, are exactly the same as those for Phase 2 (Table 12) – except that they are reversed. Priority number 3 remains the same across both phases of the study and may be reflective of the larger and more complex organisational structure of secondary schools. 'Improve the physical environment' becomes a higher priority in Phase 2 of the project.

When looking at the development priorities chosen by different role and management groups in participating Buckinghamshire secondary schools, it is evident that there is a greater degree of variation than in participating Buckinghamshire primary schools. As with primary teachers, secondary teachers working in the classroom rated 'Improve and balance workloads' as their top priority in both phases of the research project. In Phase 1 of the programme, secondary support staff all prioritised creating closer links between managers and other staff, but in Phase 2 those working in the classroom articulated a strong need for additional training and development, whilst those working outside the classroom highlighted a need to improve the physical environment. Teachers primarily working outside the classroom chose 'Develop a clear and shared idea of what we are trying to achieve' in both Phase 1 and Phase 2 of the programme.

Non-managers working in Buckinghamshire secondary schools rated creating closer links between managers and staff as most important in Phase 1, but improving the physical environment in Phase 2. Senior managers chose 'Develop a clear and shared idea of what we are trying to achieve' as their number one priority in Phase 1 but, interestingly, they also prioritised improving the physical environment in Phase 2. The category of 'other managers' chose to prioritise improving and balancing workloads in both phases of the programme.

3.5.3.3 Special schools

Table 13: Top three 'development priorities' in participating special schools
in Buckinghamshire, Phase 1

Rank	Development priority	Rating
1	Develop a clear and shared idea of what we are trying to achieve	1.93
2	Create closer links within and between teams	1.66
3	Create closer links between managers and staff	1.29

Table 14: Top three 'development priorities' in participating special schools
in Buckinghamshire, Phase 2

Rank	Development priority	Rating
1	Create closer links between managers and staff	1.82
2	Improve consultation on the decisions that affect us	1.41
3	Improve how we communicate with each other	1.36

The third development priority for participating special-school staff in Phase 1, shown above in Table 13, became the top priority in Phase 2 (see Table 14). The top two priorities in Phase 1 remained in the 'top five' in Phase 2. It is noteworthy that, unlike in the case of Buckinghamshire primary and secondary schools, 'Improve and balance workloads' does not feature in the overall top three priorities for participating special schools in either Phase 1 or Phase 2.

There is a broad level of consistency in the choice of development priorities by different special-school staff groups. However, closer analysis of the Buckinghamshire special-school data identifies teachers in the classroom choosing 'Improve and balance workloads' as their top priority in Phase 1. All other role groups chose 'Develop a clear and shared idea of what we are trying to achieve', which remained a top priority for senior managers in Phase 2, when every other role group except support staff outside the classroom identified a strong need for 'closer links between managers and staff'. Support staff outside the classroom chose 'Improve how we communicate with each other' as their main priority.

3.6 GROUP DATA PROFILES FOR NEWCASTLE UPON TYNE

3.6.1 Sections and themes overall

OSRM 'section' and 'theme' data from Newcastle upon Tyne (see Figures 9 to 12 inclusive) closely reflects national trends in the following ways:
- Well-Being ratings in secondary schools are consistently lower than those in primary schools
- The survey sections 'relationships', 'role' and 'support' generally attract some of the highest ratings in the survey
- 'Change' and 'personal wellbeing and worklife balance' are sections that tend to attract lower ratings.

In summary, the overall data for participating primary and secondary schools in this research study is consistent with national OSRM section data for primary and secondary schools.

3.6.1.1 Primary schools

Figure 9: Overall OSRM 'section' ratings for participating
Newcastle upon Tyne primary schools; Phase 1 and Phase 2
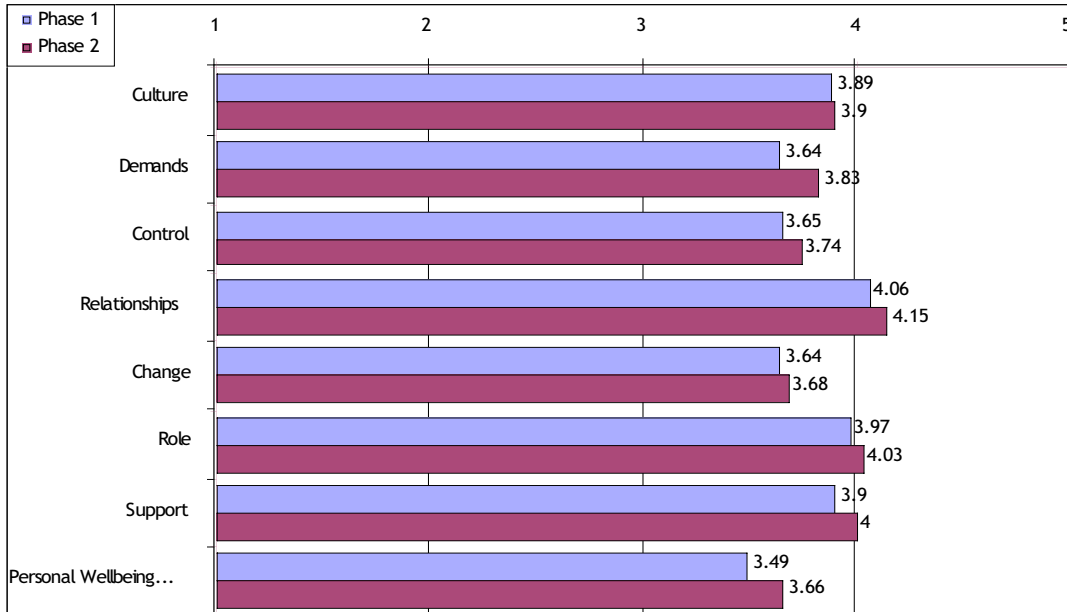
Figure 10: Overall OSRM 'theme' ratings for participating
Newcastle upon Tyne primary schools; Phase 1 and Phase 2
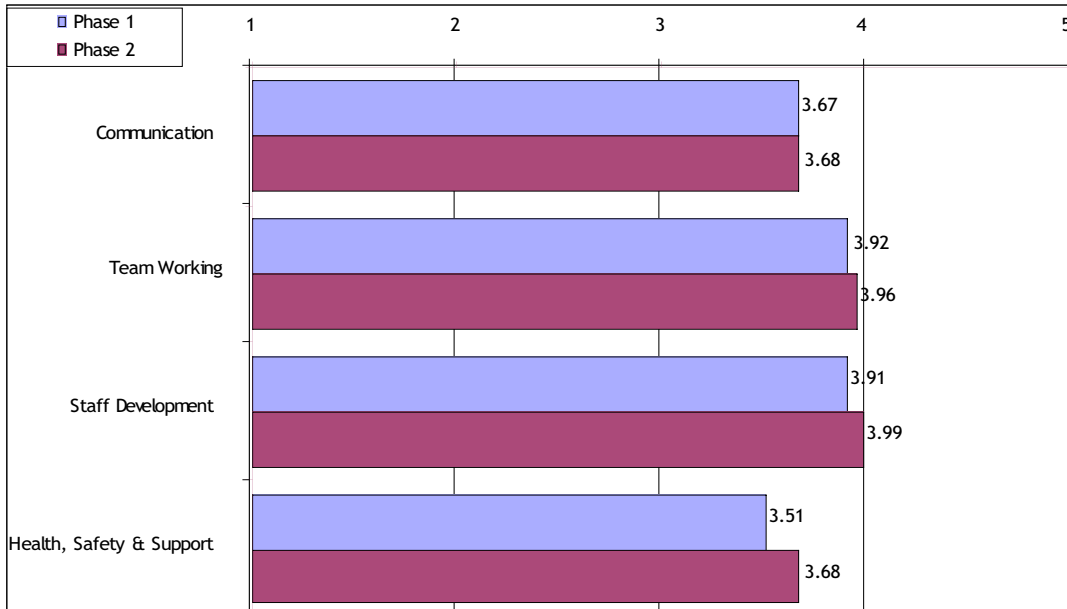
Figures 9 and 10 show that most OSRM section and theme ratings rose over the course of the research project in Newcastle upon Tyne primary schools. The areas of 'demands', 'personal wellbeing and worklife balance' and 'health, safety and support' saw the greatest increases.

Considering the detailed Newcastle upon Tyne data against the national data available, it is clear that:

- all overall section and theme ratings for Newcastle upon Tyne primary school staff were above the national average in Phase 1 of the project except for in three areas: 'demands', 'personal wellbeing and worklife balance' and 'health, safety and support', ratings for which came in below the national average
- all overall section and theme ratings for Newcastle upon Tyne primary school staff were above the national average in Phase 2 of the project – as they were for Buckinghamshire primary school staff

3.6.1.2 Secondary schools

Figure 11: Overall OSRM 'section' ratings for participating Newcastle upon Tyne secondary schools; Phase 1 and Phase 2
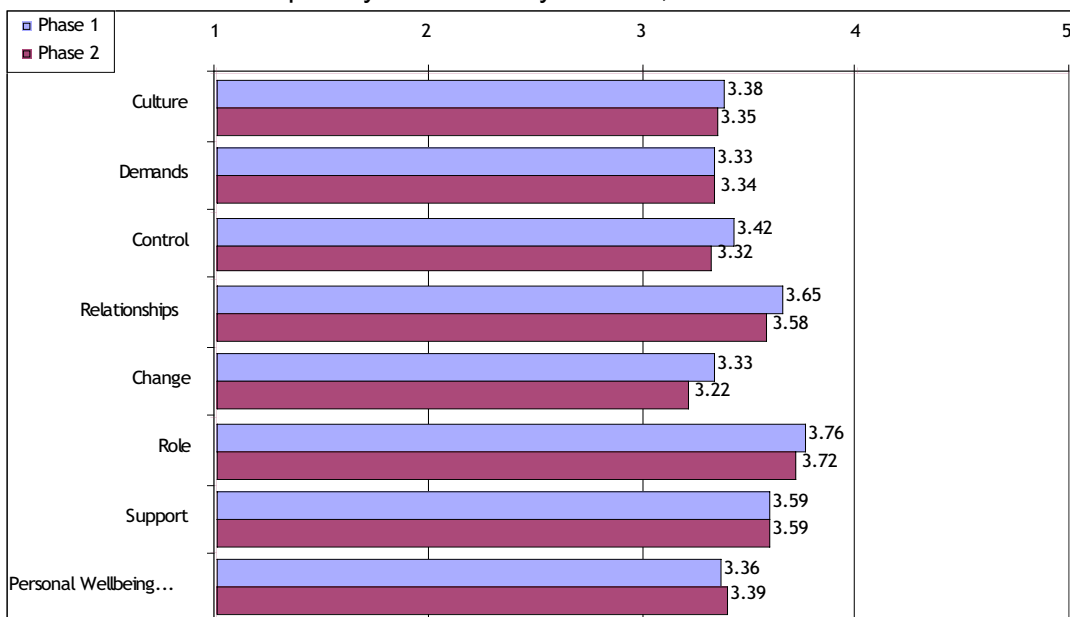
Figure 12: Overall OSRM 'theme' ratings for participating
Newcastle upon Tyne secondary schools; Phase 1 and Phase 2
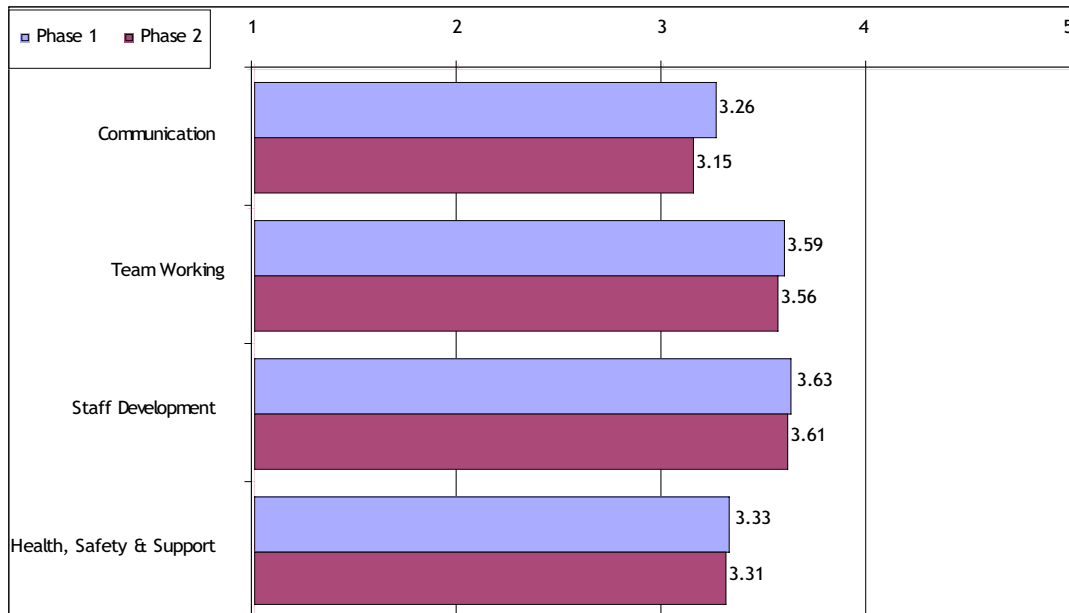
Figures 11 and 12 show that the OSRM ratings for Newcastle upon Tyne secondary schools either stayed the same or decreased between Phase 1 and Phase 2 across the survey. The areas of 'control', 'change' and 'communication' saw the greatest decrease in ratings.

In line with national findings, Newcastle upon Tyne secondary staff rated every OSRM section and theme lower than Newcastle upon Tyne primary staff.

Considering detailed Newcastle upon Tyne data against the national data available, it is evident that:
- overall Phase 1 section and theme ratings for Newcastle upon Tyne secondary-school staff were above the national average in most areas. The rating for the theme of 'staff development' matched the national average, and ratings were below average for the areas of 'culture', 'demands', 'relationships', 'support' and 'team working'
- all overall section and theme ratings for Newcastle upon Tyne secondary school staff were above the national average in Phase 2 of the project except for the 'control' rating, which was slightly below average

3.6.2 Changes in statement outcomes

3.6.2.1 Primary schools

Table 15: The five statements to receive the greatest increases in ratings overall in participating primary schools in Newcastle upon Tyne between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	I seldom feel overloaded by my work	+11.9
2	I seldom feel under unreasonable pressure at work	+11.7
3	I am able to take sufficient breaks during the course of my working day	+10.6
4	All in all, my quality of life is very good	+9.4
5	I am able to decide the pace at which I work	+8.7

Table 16: The three statements to receive the greatest decreases in ratings overall in participating primary schools in Newcastle upon Tyne between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	Different groups and teams plan together and co-ordinate their activities	-2.2
2	At work, I am less stressed than 12 months ago	-1.3
3	I am clear about my roles and responsibilities	-0.9

3.6.2.2 Secondary schools

Table 17: The five statements to receive the greatest increases in ratings overall in participating secondary schools in Newcastle upon Tyne between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	I receive adequate health and safety training	+6.8
2	We are given the help and training we need to cope with the effects of change	+6.5
3	I seldom feel under unreasonable pressure at work	+6.5
4	Looking back, most of the recent changes have been for the better	+6.2
5	If the pressure of work is ever too great, I feel I can do something constructive about it	+5.9

Table 18: The three statements to receive the greatest decreases in ratings overall in participating secondary schools in Newcastle upon Tyne between Phase 1 and Phase 2

Rank	Statement	Percentage change
1	I have a good physical environment to work in	-4.7
2	I am not aware that other members of staff are harassed, bullied or victimised	-2.2
3	I am not aware that other members of staff experience unfair discrimination	-2.1

3.6.3 Development priorities by school type

In the Well-Being Programme's survey of staff perceptions, staff were asked to choose five priorities from a possible 20 and to rank these in order of importance. Chosen priorities are given a rating that reflects the order of preference.[20]

The areas of workload, creating closer links between managers and other staff and developing a clear and shared direction are the most consistent development priorities to emerge across participating Newcastle upon Tyne schools.

3.6.3.1 Primary schools

Table 19: Top three 'development priorities' in participating primary schools in Newcastle, Phase 1

Rank	Development priority	Rating[14]
1	Improve and balance workloads	1.79
2	Develop a clear and shared idea of what we are trying to achieve	1.62
3	Develop the skills and training we need to do our jobs	1.47

Table 20: Top three 'development priorities' in participating primary schools in Newcastle upon Tyne, Phase 2

Rank	Development priority	Rating
1	Develop a clear and shared idea of what we are trying to achieve	1.53
2	Create closer links within and between teams	1.42
3	Improve consultation on the decisions that affect us	1.32

The priorities listed in Tables 19 and 20, above, emerged as the most popular for staff working in participating primary schools in Newcastle upon Tyne across the two phases of the research project.

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[20] *The rating system for the development priorities differs from the rating system employed in the rest of the Well-Being Programme's survey of staff perceptions. In this different system, the top two development priorities chosen by each individual receive additional weighting: every individual's first choice is given 6 points, his or her second choice 5 points, the third 3 points, the fourth 2 points and the fifth 1 point. The total number of points given to each development priority by all respondents have been added together and divided by the total number of respondents in each sector category. Thus, the closer the overall rating is to 6 (the maximum), the more highly – and unanimously – this priority was rated by staff*

'Improve and balance workloads' is not in the top three development priorities for Newcastle upon Tyne primary staff in Phase 2, despite being rated highest in Phase 1. To see why this might be the case, it is interesting to look at the data broken down by role group and management category. One role group (teachers working in the classroom) and both categories of managers ('senior' and 'other') chose 'Improve and balance workloads' as their top priority in Phase 1.

Whilst senior managers and teachers working in the classroom still rated it first in Phase 2, for teachers working in the classroom the priority's rating fell from 2.54 to 1.86. The priority fell to number 3 for the category of 'other managers', with its rating dropping from 2.91 in Phase 1 to 1.38 in Phase 2. This group rated the area of communication highest in Phase 2.

The categories of non-managers and support staff each rated 'Develop a clear and shared idea of what we are trying to achieve' as their priority number one in Phase 1, and retained this as their main priority in Phase 2 of the research project. Support staff working in the classroom chose 'Develop the skills and training we need to do our jobs' just above 'Develop a clear and shared idea of what we are trying to achieve' in Phase 2.

3.6.3.2 Secondary schools

Table 21: Top three 'development priorities' in participating secondary schools
in Newcastle upon Tyne, Phase 1

Rank	Development priority	Rating
1	Improve and balance workloads	1.52
2	Develop a clear and shared idea of what we are trying to achieve	1.30
3	Create closer links between managers and staff	1.30

Table 22: Top three 'development priorities' in participating secondary schools
in Newcastle upon Tyne, Phase 2

Rank	Development priority	Rating
1	Improve and balance workloads	1.30
2	Create closer links between managers and staff	1.23
3	Develop a clear and shared idea of what we are trying to achieve	1.14

In participating Newcastle upon Tyne secondary schools, the same three priorities are rated highest by staff – with 'Improve and balance workloads' highest in both phases. The appearance of 'Create closer links between managers and staff', which does not appear in the top three for Newcastle upon Tyne primary staff, mirrors the situation in Buckinghamshire secondary schools and is perhaps further evidence of the more complex layers of management in larger organisations.

Considering the data by role and management status, both the category of 'teachers working in the classroom' and 'other managers' (i.e. other than 'senior managers') prioritised 'Improve and balance workloads' in both phases of the programme. Non-managers chose 'Create closer links between managers and staff' across both phases. For support staff working outside the classroom, the Phase 1 development priority was 'Create closer links within and between teams'. This remained the second highest-rated priority in Phase 2, with 'Develop a clear and shared idea of what we are trying to achieve' the highest rated. The greatest change in priorities was seen for support staff working in the classroom. None of the top three priorities chosen by

this group in Phase 1 (when 'Develop the skills and training we need to do our jobs' was number one) appeared in their top five priorities in Phase 2, when 'Create closer links between managers and staff' was the main priority.

3.7 BENEFITS OF THE FACILITATOR NETWORK MEETINGS

Attendance at facilitator network meetings was high in both authorities, and there was a very high level of engagement from facilitators. The meetings were considered a key part of the process. In both authorities, the meetings were hosted jointly by WLS and the local authority in a way that clearly demonstrated the value placed on the facilitators by each authority.

"I have really appreciated the facilitator network meetings. They are like a network of support that keeps an eye on the wider world. Without them we'd lose our focus and having the meetings keeps us on track."
Headteacher, Hyde Heath Infant School, Buckinghamshire

"I have enjoyed coming along to the facilitator meetings and taking back to the Well-Being team in school the ideas and suggestions that came out of these meetings"
Well-Being facilitator, Newcastle upon Tyne

"Our Facilitators Network has been active and colleagues have been very supportive of each other, sharing ideas and advice in a challenging atmosphere."
Anne Shackleton, key local authority contact, Newcastle upon Tyne

Facilitator network meetings were the principal channels for exchange of ideas between facilitators. Facilitator network meetings, review meetings and feedback consultations were also used by consultants to raise awareness of online case studies from other schools[21].

Some groups of facilitators in Newcastle upon Tyne worked together outside network meetings. The extent to which these pairings or groupings formed channels for the exchange of best practice is not known. Interestingly the groups were not necessarily composed of facilitators from schools in the same sector, pyramid, geographical location or working on the same issues.

Telephone and email contact between the WLS consultant and school facilitators was primarily used for administration, requests for specific resources and support with practical issues.

3.8 FEEDBACK FROM SCHOOLS ON THE IMPACT OF THE PROGRAMME[22]

Following the OSRM survey, staff in each participating school were provided with a data profile showing the perceptions of wellbeing in their organisation (not shown in this report) and went through a subsequent process of discussion, consensus, planning and implementation to generate a series of outcomes. Each school was encouraged to progress at a rate and in a direction appropriate to their own context.

As part of the review process and within some questionnaires, some headteachers and facilitators reported that they found it difficult to make judgements about the programme's impact over the relatively short time of the research project. A number commented that long-

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[21] *These case studies are available on a private Well-Being website to which all Well-Being team members have access*

[22] *In addition, three case studies from schools in Buckinghamshire and two from Newcastle upon Tyne are attached as Appendix 5*

term improvements often come about more gradually and that outcomes are not always immediately measurable.

3.8.1 Feedback garnered at facilitator network meetings

Nonetheless, school staff reported the following positive outcomes during facilitator network meetings in Buckinghamshire and Newcastle upon Tyne:

- *Some important 'quick wins':* A range of activities were initiated to enhance staff wellbeing. Some of these were therapeutic, some social and others simple gestures either from individual staff members or the senior management team. Several schools reported improved staff areas (for example, the staffroom or toilets) and more thought being given to staff refreshments. Short social opportunities in the staffroom involving all staff were a common feature in many Buckinghamshire schools. There has been a focus on initiatives to support worklife balance in Newcastle, with several schools facilitating access, for example, to commercial ironing services.
- *Increased resources:* Some schools invested in additional staffing, storage or other types of resources to increase capacity in recognition of workload issues highlighted in the course of the Well-Being Programme.
- *Improved communication:* A range of strategies were implemented to improve different aspects of communication – examples include staff noticeboards, suggestion boxes and improved staff briefings and bulletins. Staff have reported that they feel they have more of a voice and that common issues are being identified more successfully, impacting on all staff groups within a school.
- *Restructured change teams:* The structure, implementation and focus of the 'change team' (related to the Remodelling agenda[23]) has been considered in some schools.
- *Enhanced meetings:* A number of schools have altered the nature, focus and timing of meetings and/or the inclusion of staff. One school cited as a benefit of the programme the *"greater involvement of staff and more opportunities to contribute ideas for discussion"[24]*.
- *Improved school culture and ethos:* Staff have begun to acknowledge the support they receive from each other and many schools talked of a more open, supportive team culture – where problem solving is a shared responsibility. The Well-Being Programme has even been said to be 'changing everyday language': *"the language of staff wellbeing is being used regularly"[17]*.
- *Closer links between managers and other groups of staff:* Another benefit of the programme, according to a number of schools, is that staff are now more *"aware that the senior leadership team care"[17]*. Other schools have cited *"improved understanding of the role of management by many other members of staff"* and *"a thorough understanding of the different perspectives of different groups of staff"*.

3.8.2 Results of school evaluation questionnaire

The school evaluation questionnaire was returned by 21 headteachers in Buckinghamshire (representing 61% of participating schools) and 14 facilitators.

It was returned by 14 headteachers in Newcastle upon Tyne (representing 56% of participating schools) and 4 facilitators. The combined responses of all respondents are reported overleaf.

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[23] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*
[24] *School-review questionnaire, Buckinghamshire*

Table 23: Please indicate how well the Well-Being Programme has supported or complemented the following. Rate each one on a 1-5 scale where 1 is not at all supported or complemented and 5 is very well supported or complemented[25][26]

	Combined headteacher responses for Buckinghamshire and Newcastle upon Tyne		Combined facilitator responses for Buckinghamshire and Newcastle upon Tyne	
	Responses in the range 3-5	Responses in the range 2-5	Responses in the range 3-5	Responses in the range 2-5
Healthy Schools	91%	91%	71%	77%
Investors in People	77%	81%	70%	92%
Workforce Remodelling/ Development	73%	91%	81%	94%
School Self-Evaluation	79%	88%	67%	95%
OFSTED	67%	86%	50%	81%
HSE Management Standards	73%	73%	50%	87%

Combined headteacher and facilitator responses for Buckinghamshire and Newcastle upon Tyne		
	Responses in the range 3-5	Responses in the range 2-5
Healthy Schools	82%	84%
Investors in People	74%	86%
Workforce Remodelling / Development	76%	92%
School Self Evaluation	72%	90%
OFSTED	58%	83%
HSE Management Standards	62%	80%

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[25] *Responses given to specific elements are shown as a percentage of all responses returned*

[26] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*

Table 24: Have the statements in the online survey been useful in raising awareness of factors that affect staff wellbeing?

	Yes a lot	**Yes a little**	**No, not really**
Buckinghamshire	67%	33%	0%
Newcastle upon Tyne	47%	41%	12%
OVERALL	59%	36%	5%

Table 25: Has the programme supported staff to take personal responsibility for their own wellbeing?

	Yes a lot	**Yes a little**	**No, not really**
Buckinghamshire	13%	74%	13%
Newcastle upon Tyne	6%	76%	18%
OVERALL	10%	75%	15%

Table 26: Has the programme encouraged an atmosphere in which staff groups feel able to contribute to the promotion of wellbeing?

	Yes a lot	**Yes a little**	**No, not really**
Buckinghamshire	23%	73%	4%
Newcastle upon Tyne	29%	65%	6%
OVERALL	26%	69%	5%

Table 27: On a 1-5 scale where 1 is no impact at all and 5 is very positive impact, please rate the Well-Being Programme for your perception of its impact so far on the following areas

	Responses in the range 3-5
School culture and ethos	*82%*
Communication	*79%*
Staff morale	*74%*
Staff performance	*68%*

Although, in table 27, school culture and ethos comes out top over levels 3 to 5, 55% of respondents ranked Communication as the area on which the programme was perceived as having greatest impact (levels 4 and 5).

Table 28: Would you recommend the Well-Being Programme to other schools?

	Yes	**No**	**Not sure**
Buckinghamshire	78%	4%	18%
Newcastle upon Tyne	88%	6%	6%
OVERALL	82%	4.5%	13.5%

"You don't really think you need it - but you do!"
Headteacher, The Oaks PRU, Buckinghamshire

"A very valuable experience; we have gained a lot from it.
It has given us 'permission' to focus on ourselves."
Comment on Well-Being review document, Buckinghamshire

As a brief summary of these questionnaire results, the Well-Being Programme has:
- raised awareness of the factors that affect staff wellbeing
- supported staff to take personal responsibility for their own wellbeing
- encouraged an atmosphere in which staff groups feel able to contribute to the promotion of wellbeing

The impact of the programme in school has principally been on the following areas:
- school culture and ethos
- communication
- staff morale
- staff performance

The Well-Being Programme has principally supported:
- Workforce Remodelling
- School Self-Evaluation
- Healthy Schools
- Investors in People[27]

82% of respondents would recommend the Well-Being Programme to other schools.

3.9 FEEDBACK FROM THE LOCAL AUTHORITIES ON THE IMPACT OF THE WELL-BEING PROGRAMME ON PARTICIPATING SCHOOLS

In Buckinghamshire, the key local authority contact was conscious that the individual school data was confidential to the schools. Her perception about the programme's impact on schools could only therefore be based on discussions initiated by schools or from the information shared at facilitator network meetings. Given that schools work on the programme at their own pace and on their own chosen priorities it was understandably hard for her to give a measurable

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[27] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*

impression of the impact. Nevertheless she was aware that the level of impact varied greatly from school to school and often depended on the school's choice of facilitators and the determination of the school's leadership to make the programme work.

Most schools chose to share their confidential data profiles with the key local authority contact in Newcastle as Head of Support for School Managers (although individual school data profiles were not shared with others in the authority). This enabled the schools to link two otherwise separate strands of work around staff wellbeing, and put the local authority contact in a position to make an informed judgement about the impact of the Well-Being/Support for School Managers partnership on schools. Her perception was of "*a very positive impact:*

- *Anecdotal feedback has been overwhelmingly positive and headteachers have been happy to endorse the programme to other headteachers*
- *Schools have valued the opportunity to work at their own pace. They have taken steps that are appropriate to them, sometimes progressing in small increments; at other times organising quite major activities.*
- *The programme has considerably raised awareness of the benefits of promoting staff wellbeing. Managers' – and staff's – understanding of the concept has deepened*
- *For some, the knowledge and skills relevant to handling pressure have been developed, leading to effective support for colleagues as well as improved self-management*"

3.10 POTENTIAL BARRIERS TO PROGRESS IN SCHOOLS

As part of the Well-Being Programme's learning process to identify issues and generate solutions, facilitators discussed challenges they had faced while implementing the programme:

- ***Staff attitudes and response to the programme:*** Managing staff expectations appears to have been a major challenge in some schools – both their expectations of the programme itself and unrealistic expectations of the facilitators. Facilitators report that some staff remained sceptical about whether anything will change as a result of the programme. Encouraging staff to take some personal responsibility for their engagement in the process is a strong message and a source of frustration for facilitators when trying to encourage enthusiasm for the programme.
- ***Management attitudes and response to the programme:*** The response of the senior management team appears to have been a critical factor. In the early stages, many facilitators reported frustration at the length of time taken to agree and implement actions. Some facilitators appeared uncertain as to whether the programme had the full commitment of the school's senior leadership team despite their having signed up to the programme. This uncertainty may link with the perceived lack of status of some of the facilitators as well as the ease of access to school leadership.
- ***Time:*** Many schools have reported that time is a major barrier to change. Some have felt frustrated at their inability to timetable meetings to discuss issues because of the wide range of other priorities facing the school. The ability to fully consult on and discuss the issues raised through the Well-Being survey is essential, but is often seen as a rare luxury in schools.
- ***Money:*** Several schools report insufficient financial resources to enable them to implement the actions they feel would make a significant difference to staff wellbeing in their schools, particularly with respect to the physical environment.
- ***Other pressures:*** Staff changes, management changes, staff absences and Ofsted inspections were among a wide range of other challenges cited. One facilitator in Newcastle upon Tyne commented in the final evaluation questionnaire that the Well-Being Programme was "*very, very worthwhile, but difficult to maintain*"
- ***Loss of momentum:*** The Newcastle upon Tyne lead partner emphasised that the programme needs to be constantly evolving in order to sustain the challenge for

longer-term participants. The Buckinghamshire lead partner recognised the need for the programme to be flexible and relate to local needs.

Possibly the most effective way of overcoming all of these many and varied obstacles, as one person commented during the school-review process in Buckinghamshire, is to *"view wellbeing as a benchmark of everything we do – not as a bolt-on exercise."*

3.11 IMPACT OF THE WELL-BEING PROGRAMME ON THE LOCAL AUTHORITIES

3.11.1 Buckinghamshire

The key local authority contact in Buckinghamshire is confident that the Well-Being Programme and its impact is gaining momentum. It is now providing strategic support to a number of key areas, including:

- staff retention
- work-life balance
- performance management
- Workforce Remodelling[28]

The Well-Being Programme also complements the authority's People Strategy.

The first set of data from the programme was shown to the Director of Children's Services and has been used in discussions with Health and Safety staff. The authority took a number of specific actions as a result of the Phase 1 group data profile. For example, resources were focused on change management, since this was an area that came out as being rated below the national average. The key local authority Well-Being contact and the Workforce Development Adviser worked, alongside the WLS consultant, to remind schools of the change-management processes available within the Remodelling initiative[29] and to support staff with action planning. The success of this particular focus was reflected in the increase in ratings relating to change in the Phase 2 group data profile.

Buckinghamshire envisage that the data from the second phase of the programme will be even more helpful across the authority.

In response to the question 'Would you recommend the Well-Being Programme to other authorities?', the lead Well-Being contact in Buckinghamshire said:

"Most definitely – as long as the authority has the capacity to manage the process… This has worked well because of the partnership working between Buckinghamshire County Council and Worklife Support. WLS worked hard to recognise and meet our needs as an authority rather than just 'delivering a package'. The schools have perceived this close working partnership and I think this has made a real difference. They have welcomed the individual support they have received."

3.11.2 Newcastle upon Tyne

The key local authority contact reported that the Well-Being Programme has been written into Newcastle's Stress-Management policy as a process schools might adopt to manage stress risk factors. The Workforce Remodelling Team helped finance the programme and it is viewed as a way of meeting the Remodelling work-life balance agenda[27].

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[28] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*

The lead partner in Newcastle upon Tyne cited a number of concrete ways in which the Well-Being Programme had impacted positively on the local authority to date:

- The programme provides the authority with a tried-and-tested way of meeting its obligations under health and safety legislation
- Newcastle upon Tyne's ultimate aim is to gain a reputation as a 'wellbeing' employer, helping them to retain and recruit effective staff. The programme has provided a strategy for actively demonstrating how seriously the authority takes staff welfare
- The programme is one important strand in Newcastle upon Tyne's efforts to achieve *"a caring culture that encourages effective working"*. In particular, they value the concept of a staff-led approach that encourages everyone to take responsibility for their own wellbeing
- The programme offers a sustainable strategy that also provides a means of 'capacity building' through the training of Well-Being teams, enabling them to undertake work in this area for themselves
- The programme has helped to raise understanding of effective pressure management and how to support colleagues who may be experiencing stress. There is also some evidence of positive outcomes around staff absence
- Newcastle upon Tyne plans to use the data from the two phases of the programme to understand what it is that they do well – and to celebrate this. They will also use it to identify potential areas for development. In partnership with their schools, they will devise a plan of action, including strategic steps the authority can take

In response to the question 'Would you recommend the Well-Being Programme to other authorities?', the lead Well-Being contact in Newcastle said:

"Yes, we would. We would wish to emphasise, however, that it has been such an effective process for us partly because of the work-life-balance culture we were already developing and due to the close partnership working between ourselves and WLS. We have also been careful to explain that this is not a deficit model or a panacea for all stress-related difficulties."

3.12 MEASUREMENT OF STAFF SICKNESS ABSENCE[30]

As explained in section 2.4.4, whilst both authorities supported attempts to match data-collection systems to the specific population of staff on the Well-Being Programme, in both cases data was collected from a smaller population. The effect of this may be that any changes in staff absence are under-reported.

Buckinghamshire provided data from the Department for Children, Schools and Families' (formerly the Department for Education and Skills) school-census data (collected via the 618G form[31], the relevant parts of which are attached for information as Appendix 5). The 618G database contains data relating to full-time and part-time teachers with permanent contracts or contracts longer than one month, but not to any other categories of school staff. This means that the population of staff for which absence data was collected in Buckinghamshire was significantly smaller than the total population of staff involved in the Well-Being Programme. In addition, this data is annual data that cannot be broken down into 6-month periods.

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[30] *This sickness-absence data has not been tested for statistical significance*

[31] *Each year the DCSF contacts local authorities to request data for the annual 618G survey. The 618G form is a compulsory survey that collects data on a range of areas, including a school's total number of teachers employed, teacher vacancies, educational psychologists, levels of sickness absence and ethnicity. Data is provided to the DCSF at authority level only*

Data from Newcastle upon Tyne's own Best Value Performance Indicator (BVPI) database, which permits the conversion of hours lost into 'full-time equivalents' (FTEs), was used in this study. This database covers all categories of staff directly employed by schools – but only those individuals that have been employed for a period of one year or more. This population of staff is, however, closer to the actual population of staff involved in the Well-Being Programme than is the case in Buckinghamshire. This data was collected twice yearly, thereby providing a more detailed picture of annual absence patterns in the school sector. Newcastle made a particular effort to ensure the accuracy of the data collected by investing a good deal of effort into clarifying the absence-reporting process in their schools.

In both authorities, data was collected for the period immediately preceding the project and as close as possible to the end of the programme.

3.12.1 Buckinghamshire

According to the data shown in Figure 13, below, the group of Well-Being schools had marginally higher absence rates than that of non-Well-Being schools before the programme began. These rose slightly in the middle of the study before falling back to a similar level as at the beginning of the study. Those of non-participating Buckinghamshire schools fell slightly throughout.

Figure 13: Actual number of teacher absence days per full-time equivalent (FTE) for the 2005 and 2006 calendar years, Buckinghamshire[32] [33] [34]

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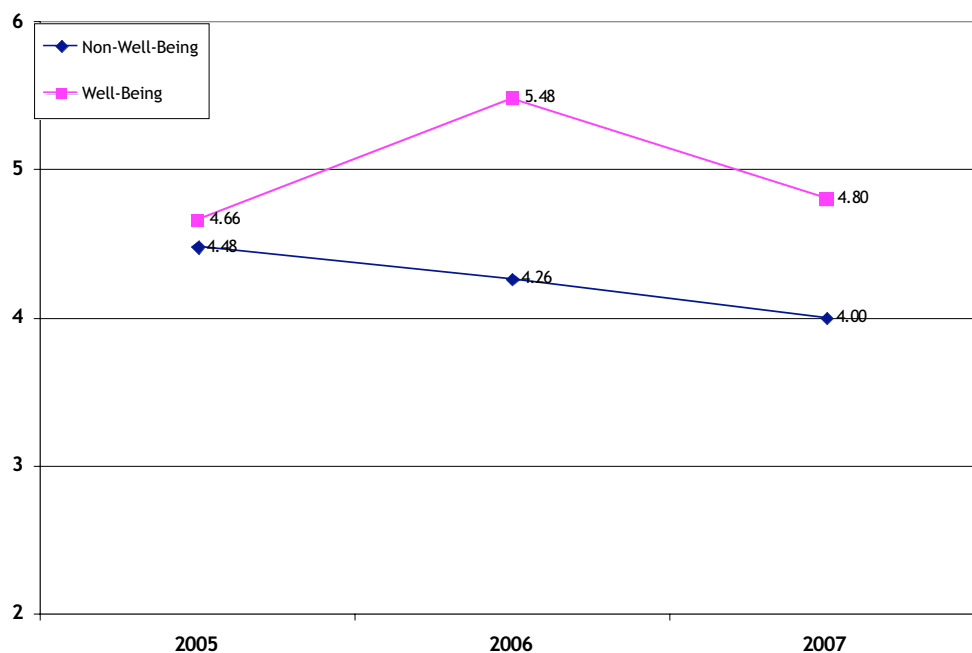
[32] *Only teachers with permanent contracts or contracts of over one month are included in this Buckinghamshire data*

[33] *Calculations are based on the number of FTE teachers, but the actual number (not FTE number) of days lost to absence, as requested on the government's 618G form*

[34] *The number of days' absence quoted for Buckinghamshire correspond to full calendar years in contrast to the number of days' absence quoted for Newcastle upon Tyne below, which are for 6-month periods*

3.12.2 Newcastle upon Tyne

Unlike the Buckinghamshire data, the Newcastle upon Tyne absence data is broken down into six-month periods (see Figure 14). The data accurately reflects the actual number of absence days taken during each six-month period (in other words, the data has not been 'annualised').

It is worthy of note that the particular pattern of fluctuating staff-absence levels shown in this chart – with levels of absence lower during the July-to-December period than during the January-to-June period – is typical of the school sector. This owes itself primarily to the fact that, in schools, there are fewer working days during the second half of the calendar year than during the first, and therefore fewer potential days of absence. If the same data was shown by 12-month period, it would paint a very similar picture to that of Buckinghamshire.

Data for the six-month period immediately preceding the research study (January to June 2005) reveals that the group of schools on the Well-Being Programme entered the study with a higher absence rate than the group of non-Well-Being schools. In the equivalent period at the end of the study January to June 2007, the rate of absence had dropped in the Well-Being group although it had risen in the group of non-participating schools.

When the data is considered annually (discounting the seasonal peaks and troughs), there is an initial rise in staff-absence levels between 2005 and 2006 for the group of Well-Being schools, whilst absence levels in the non-participating schools appear to remain stable. However, in the first half of 2007, the absence in the group of Well-Being schools falls below the previous levels observed at that time of year and the absence in the group of non-Well-Being schools rises higher than has previously been observed.

Figure 14: Actual number of staff absence days per full-time equivalent (FTE) for each 6-month period between January 2005 and June 2007, Newcastle upon Tyne[35][36]

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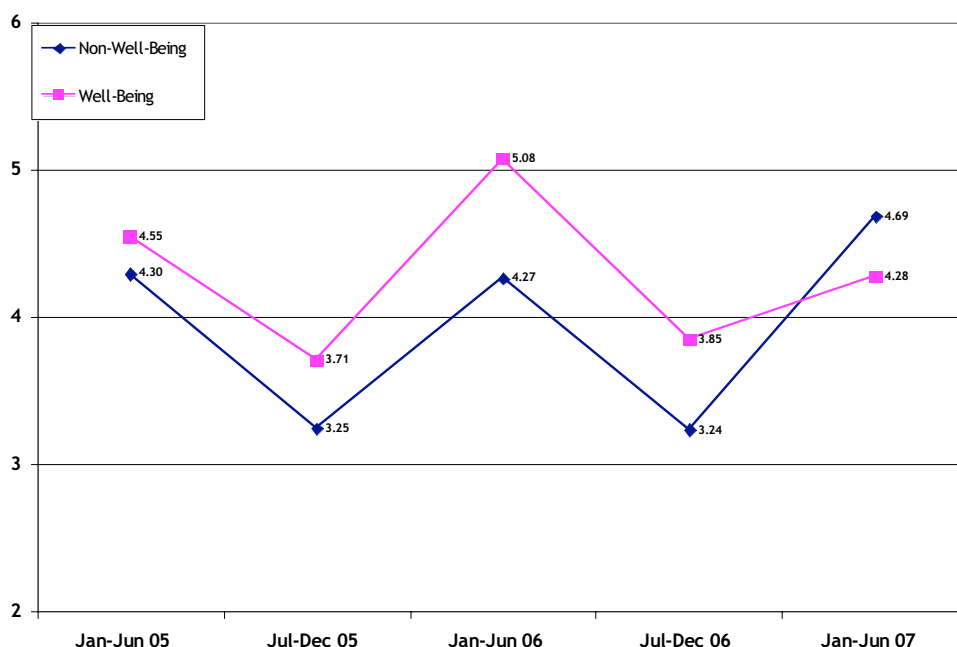
[35] *The data includes all categories of staff, but only those staff members directly employed by schools for a period of one year or more*

[36] *Calculations are based on number of FTE staff and number of FTE days lost to absence*

3.13 AWARENESS OF THE HEALTH AND SAFETY EXECUTIVE MANAGEMENT STANDARDS

As part of the school-review process and in the final evaluation of the project, Buckinghamshire headteachers and facilitators were twice asked 'How well has the Well-Being Programme supported or complemented the following?' (see Table 23, earlier). Included in the ensuing list was the HSE Management Standards for Work-Related Stress.

Answering the question in February 2007, 68% of respondents indicated raised awareness and some level of impact (judged by a rating of 2 or more on the scale of 1-5). In July 2007, 80% of respondents indicated raised awareness and some level of impact.

The increase with time was greater at lower ratings than at higher ratings (in other words, more individuals realised that there was a connection between the Well-Being Programme and the HSE Management Standards rather than the same individuals expressing a stronger perception).

CHAPTER 4:
DISCUSSION AND CONCLUSIONS

4.1 DISCUSSION

4.1.1 Effectiveness of the approach in schools

It is often difficult to provide an unequivocal demonstration of quantitative success in a programme of limited duration such as this. Many of the issues affecting the wellbeing of school employees are deeply rooted in the culture and ethos of the organisation and can require a long-term programme of change to achieve a shift.

Although there were only approximately 12 months between the two surveys, Well-Being ratings increased across many areas of the survey for schools in both Buckinghamshire and Newcastle upon Tyne. Schools in these authorities are in wards that are near both extremes of the UK index of deprivation[37]. This, together with findings that the Well-Being Programme consistently results in an increase in Well-Being ratings in participating schools in differing contexts[38], leads us to suggest that it is an approach that is generally applicable in the education sector.

The key features of the Well-Being Programme have been based on and refined by feedback from over 2,600 UK schools, and it is clear that the programme provides an effective framework for gaining staff consensus for local wellbeing developments (rather than for a specific solution).

In addition to raised Well-Being ratings, indicating improved staff perceptions of wellbeing in their schools, this study reports raised awareness of wellbeing issues, a positive impact on school culture and positive interaction with other initiatives and activities in the education workplace[39]. These outcomes are aligned with the objectives defined by the HSE for the education sector.

The parallel process being undertaken by the local authority, which involves a focus on managing and monitoring wellbeing, is likely to have additional positive outcomes that impact on the schools by way of a virtuous cycle.

During the process of programme evaluation, there was a recognition on the part of several participating schools that changes and improvements often take place over an extended period of time. Some of the programme's benefits, therefore, have yet to be realised. Nonetheless, 82% of school respondents would recommend the Well-Being Programme to other schools.

4.1.2 High response rates in the Organisational Self-Review Measure

Staff response rates in the Organisational Self-Review Measure (the Well-Being Programme's survey of staff perceptions) are high relative to other staff surveys. The response rates in this study, which are broadly in line with national Well-Being Programme response rates, can give the local authorities and schools involved a high level of confidence that the views represented in both group data profiles and school data profiles reflect the views of staff overall.

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[37] *See www.communities.gov.uk/publications/communities/englishindices*

[38] *For example: The London Well-Being Pilot Programme: End-of-Pilot Report for the Department for Education and Skills (DfES) / London: Worklife Support, 2006. Downloadable from http://www.worklifesupport.com/index.cfm?a=304*

[39] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*

4.1.3 Facilitator network meetings

Well-Being facilitators are encouraged to share their progress at local network meetings. Support for individuals in the key role of facilitator is at the heart of the Well-Being Programme's 'bottom-up' approach and these meetings were a successful feature of the programme in both authorities.

Consultants have noted that individuals initially tend to value the practical steps that they have taken in their school programmes (eg re-arrangement of the staffroom or purchase of a water cooler) and typically develop an appreciation of less concrete outcomes (creation of opportunities for staff to discuss their wellbeing, development of a positive 'wellbeing language') with experience.

It is also clear from facilitator reporting that staff tend to focus on activities that support personal wellbeing at the start of a programme and to embark on more sustainable organisational changes much later – perhaps after the first year. Schools are encouraged to progress at a rate and in a direction that suits them.

4.1.4 Positioning of the Well-Being Programme within a local authority

As discussed earlier in this report, the Well-Being Programme was positioned in different departments in each of the participating authorities. Local authorities are complex organisations within which there are many separate teams with responsibilities for staff wellbeing (for example, Human Resources, Occupational Health, Health and Safety, School Improvement, Healthy Schools, Governor Services and Workforce Remodelling[40]). Although the positioning of a wellbeing intervention within a local authority may simply reflect the role of the particular individual or team taking the initiative to set it up, or the capacity of a specific team to support it, it is likely that potential participants will assume that a strategic decision has been taken. Their judgments as to what the intervention means for them will depend on their perception of the importance attached to it by senior management, and their personal view of the authority team with which it is associated. The latter may be influenced by the particular area in which the team works, associations with past successes (or otherwise) and whether the team is perceived as bringing "support" or "challenge" to schools.

4.1.5 Creation of strategic links across an authority

It has been shown that school participants well recognised the links between the Well-Being Programme and other work in which their schools were involved. It is equally important that staff wellbeing is recognised as contributing to the overall strategic priorities of an authority and that the Well-Being Programme is not treated as a stand-alone or peripheral initiative. Creating strategic links with other work taking place within the authority enriches the Well-Being Programme, promotes sustainability, disseminates the wellbeing ethos and language throughout the authority and ensures that data and other outcomes are available to all interested parties.

4.1.6 Impact on the participating local authorities

It is evident that there were a number of clearly defined and measurable areas of impact on both local authorities taking part in this research project.

Some benefits arose from the Well-Being process itself: the authorities were provided with detailed aggregate data containing information about the different school sectors and demographic groups, which is potentially valuable in the process of monitoring schools – particularly since the increasing independence of schools makes intelligence-gathering increasingly difficult. Receipt of the data had an impact on the authority because it was used to inform their provision of resources following the Phase 1 survey.

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[40] *Please see Appendix 4 for a brief introduction to some of the national initiatives in the education sector*

Although the aggregate data following Phase 2 of the programme is potentially more informative than that from Phase 1 (because of the opportunity to measure the effect of interim actions), the timeframe of this project prevents reporting on actions taken in Phase 2 and beyond. However, authorities are likely to have improved their capacity to react since Phase 1 as the Well-Being Programme's process of strategic management has resulted in increased interaction between different groups within the authority that share an interest in promoting staff wellbeing.

Applicability to other local authorities is suggested by the fact that the programme has been effective in two local authorities with rather different contexts. Both key local authority contacts indicated during interview that they would recommend the Well-Being Programme to other local authorities.

The following suggestions for increasing the programme's impact within a local authority have been made by the lead Well-Being contacts in Buckinghamshire and Newcastle upon Tyne:
- It is key to raise the programme's profile at the highest levels of an authority
- There needs to be a 'critical mass' of an authority's schools on the programme
- It is a good idea to encourage other Children's Services teams to participate actively in the programme along with schools, as was the case in Newcastle upon Tyne
- It is important to be able to demonstrate a solid business case for participation – for example, increased performance and reduced absence

"A true partnership with Worklife Support reaps great rewards – if you can, allocate a definite part of someone's role to this partnership."
Advice of lead local authority Well-Being contract to another interested authority

4.1.7 Levels of staff wellbeing in secondary schools
The data from the survey indicates that ratings across the sections and themes of the OSRM were generally lower in secondary schools than in primary schools. In addition, secondary schools appeared to be less successful in bringing about positive change in their first year. These findings are in line with Worklife Support's experience elsewhere in the country. For instance, the London Well-Being Pilot Programme (involving nearly 400 London schools and supported by the then Department for Education and Skills) reported in 2006 that:
- secondary Well-Being Programme ratings are generally much lower than those of primary schools
- whilst 63% of OSRM statements rated by secondary school staff improved from the first year of the pilot programme to the second, this was significantly less than in the primary sector, where 89% of statements rose
- 34% of all EAP cases were raised by staff in secondary schools, although less than 23% of staff on the London programme were secondary staff[41]
- there was a marked pattern of falling morale for secondary teachers over their years in education

These findings raise the question as to whether secondary schools require a tailored approach suited to their needs.

Since then, and as a result of this work, Worklife Support have developed a new model of the Well-Being Programme that is specifically aimed at improving staff wellbeing in larger schools.

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[41] *The Worklife Support EAP (Employee Assistance Programme) was an integral component of the London Pilot Programme, providing telephone and face-to-face support for individuals to complement the overall organisational support provided by the Well-Being Programme*

This model, which is currently being piloted, includes more in-depth, in-house support and is designed to address issues such as the key role of middle managers, pressure to meet academic and financial targets, pupil behaviour, departmental culture and communication challenges arising from the size and structure of large schools.

4.1.8 An association between the Well-Being Programme and staff absence
4.1.8.1 Changes in staff-absence levels
The rationale for including an investigation of sickness-absence levels in this study was that these are often key performance indicators for organisational health and wellbeing. However, given the project's short timeframe, it was anticipated that noticeable reductions in absence – which is generally a lag indicator – were unlikely.

In both participating authorities, the level of staff absence in participating schools was higher than that of non-Well-Being schools before the project began. It is unclear whether schools that self-selected to participate in the programme had characteristics, perhaps related to staff health and wellbeing, that were not matched by non-participating schools in the same local authorities. If indeed schools in certain specific circumstances were more inclined to put themselves forward for the project than others, then this may have had some impact on relative staff-absence levels between participating and non-participating schools over the course of the project. It is certainly possible that some schools were motivated to join the programme with a view to attempting to reduce staff absence in the long term.

The available data suggests that the Well-Being schools in both areas saw an initial increase in staff-absence rates. It is not uncommon for organisations who undertake this kind of work to experience a short-term increase in sickness absence as awareness of health and wellbeing issues increases. Increased staff awareness can make individuals under pressure aware of the need to remove themselves from the stressor.

In Newcastle upon Tyne, staff absence in the Well-Being schools fell after the initial spike. By the end of the study, staff absence in the Well-Being schools was lower than it had been at the outset, in contrast to an overall increase in the group of non-participating schools.

In Buckinghamshire, the available data also suggests that, after the initial spike, the Well-Being schools' absence levels then fell – this time to a level slightly above where they started. Absence levels in non-participating schools fell gradually over the course of the project.

There are many practical difficulties of setting up controlled studies for pressure management and this comparison data between the groups of Well-Being and non-Well-Being schools is not flawless in either local authority. The data is nevertheless important because it strengthens the reported association between wellbeing and staff absence. Continuation of monitoring would establish whether this pattern is stable and whether staff absence continues to fall in the two different groups of Well-Being schools. As the Well-Being Programmes are continuing in both authorities, there may be an opportunity for further research.

In addition to this hard absence data, a particular group of Well-Being Programme survey statements related to perceptions of work pressure appeared consistently amongst the statements to see the greatest levels of positive change between the two phases of the programme (see sections 3.5.2 and 3.6.2). This suggests that there may be a positive knock-on effect on staff-absence and -turnover levels, and indeed on staff performance, over time.

4.1.8.2 Collection of absence data

Collecting comparative quantitative staff-absence data across both authorities over the period of the research project has proved challenging. The difficulty of accessing accurate absence statistics for the school sector is well documented and these challenges are discussed in more detail in the WLS/HSE research paper entitled "Testing the effectiveness of the streamlined National Well-Being Programme at managing work-related stress in schools" (2007).

Furthermore, there will inevitably be confounding factors and external influences that impact on actual absence levels. It is for this reason that HSE and WLS recommend the measurement and recording of qualitative "precursor measures", such as the working-conditions questions of the HSE Management Standards indicator tool or the Well-Being Programme's OSRM survey.

Year on year, there has been a much closer focus on gleaning more accurate hard absence data from schools. This has resulted in a far clearer understanding on the parts of schools and their local authorities about the types of absences to be recorded. Nonetheless, this study's focus on absence management reveals the variation in data-collection methods used by different schools and local authorities: whilst Newcastle upon Tyne developed a new database and system of data collection for this purpose, Buckinghamshire followed the Department for Children, Schools and Families' standardised 618G procedures, therefore reporting only on teacher absence. Given the changing demographics within the school workforce (in which teachers increasingly constitute less than half of the staff in a school), there may be some value in suggesting that the DCSF's 618G survey would be well-placed to collect data across the whole staff, and not solely for teachers.

Considering the ever-increasing national focus on reducing absence across all groups of staff in the education sector, there would clearly be value in a much longer research study.

4.1.9 Support for the Health and Safety Executive objectives for stress management in education

There was a focus on raising awareness of the HSE Management Standards throughout the project and evidence that this was successful.

The group data profile's grouping of statements into 'Sections' and 'Themes' enabled the authorities to monitor the six key areas (or 'risk factors') identified in the HSE Management Standards, as well as a further two areas relating to organisational wellbeing. We have previously cited evidence that the authorities acted effectively on this data.

Schools generally reported an increased awareness of the Management Standards, although there is still work to be done to ensure that this area is seen as a priority in this sector.

4.1.10 The future of the Well-Being Programme in Buckinghamshire and Newcastle upon Tyne

The Well-Being Programmes will continue in both authorities with changes to the format which will enable access to a larger number of schools and a potential for reduced school costs.

4.2 CONCLUSIONS

4.2.1 The Well-Being Programme is an effective five-step risk-assessment approach for schools

Implementation of this Well-Being approach in schools in two rather different public-sector contexts resulted in quantifiable, concurrent improvements in overall organisational wellbeing in both contexts. We propose the Well-Being Programme, an approach recognised as broadly

equivalent to that of the HSE Management Standards, as an effective method for implementing the Management Standards in schools and a model for an effective wellbeing intervention.

4.2.2 The Well-Being Programme had a positive impact at local authority level in both contexts

The authorities received data that supported successful targeting of resources, and there is evidence that Well-Being data supported policy formulation. The programme has raised awareness within the participating authorities of the benefits of promoting staff wellbeing.

APPENDIX 1:
SCHEDULE OF THE RESEARCH STUDY

AUTUMN TERM 2005
- Specifications for the research project were agreed with the HSE
- Negotiations were undertaken with local authorities
- Newcastle upon Tyne and Buckinghamshire were identified as the two pilot authorities
- The programme strategy was agreed with the two authorities
- School recruitment began with briefing sessions for headteachers
- Early induction sessions were held for headteachers committed to joining the programme

SPRING TERM 2006
- Further briefing and induction sessions were held
- Training sessions were held for school-based "Well-Being facilitators"
- The first group of schools carried out their initial Organisational Self-Review Measure
- Survey data was generated and school data profiles produced
- Post-OSRM school feedback consultations were held

SUMMER TERM 2006
- Final Headteacher induction sessions were held
- Further training sessions were held for school-based "Well-Being facilitators"
- Further schools carried out their initial OSRM survey
- Survey data was generated and school data profiles produced
- School feedback consultations continued
- Facilitator network meetings were held
- Some schools began their action-planning process

AUTUMN TERM 2006
- Final training sessions were held for school-based "Well-Being facilitators" (for those replacing previously trained facilitators)
- Further schools carried out their initial OSRM survey
- Survey data was generated and school data profiles produced
- School feedback consultations continued
- Action planning continued in schools
- Facilitator network meetings were held
- School review meetings started

SPRING TERM 2007
- School feedback consultations continued
- School review meetings continued
- Some schools carried out their second OSRM survey
- Survey data was generated and school data profiles produced
- The second round of school feedback consultations began
- Facilitator network meetings were held

SUMMER 2007
- Remaining schools carried out their second OSRM survey
- Final school feedback consultations took place

APPENDIX 2:
SCHOOL EVALUATION QUESTIONNAIRE

The National Well-Being Programme – HSE 1 Research Project

HSE-supported partnership programme, Newcastle upon Tyne
Headteacher and facilitator evaluation

We hope you have enjoyed your Well-Being Programme to date. Your experience is an important part of our evaluation so if you are able to take a few minutes to give your views, they will be received very gratefully.

*Please complete this form from **your** perspective, simply omitting any question where you feel you have insufficient information to form an opinion. Please return your completed questionnaire to Worklife Support by **FAX on 020 7554 5239** or in the envelope provided.*

Has the Well-Being Programme:	Yes a lot	Yes a little	No, not really
... helped promote a feeling of staff wellbeing in your school?			
... supported professional development?			
... supported you or your colleagues to work towards any school targets (e.g. SIP or SEF)?			

Although the Well-Being Programme is not aimed at pupils, there may be 'knock-on' effects. Do you feel that the programme has:	Yes a lot	Yes a little	No, not really
... supported the wellbeing of pupils?			
... helped pupils to enjoy school more?			

Please answer the following questions:	Yes a lot	Yes a little	No, not really
Have the statements in the online survey been useful in raising awareness of factors that affect staff wellbeing?			
Has the programme supported staff to take personal responsibility for their own wellbeing?			
Has the Well-Being Programme encouraged an atmosphere in which staff groups feel able to contribute to the promotion of wellbeing?			

1

On a scale where 1 is no impact at all and 5 is a very positive impact, please rate the Well-Being Programme for your perception of its impact so far on the following:

	No impact => High impact				
School culture and ethos	1	2	3	4	5
Communication between staff	1	2	3	4	5
Physical work environment	1	2	3	4	5
Recruitment of staff	1	2	3	4	5
Retention of staff	1	2	3	4	5
Absenteeism and supply costs	1	2	3	4	5
Staff performance	1	2	3	4	5
Staff morale	1	2	3	4	5
Pupil behaviour	1	2	3	4	5
Anything else you wish to include here?	1	2	3	4	5

On a scale where 1 is not at all supported or complemented and 5 is very well supported or complemented, please indicate how well the Well-Being Programme has supported or complemented the following:

	No support => Good support				
Healthy Schools (NHSS)	1	2	3	4	5
Investors in People	1	2	3	4	5
Workforce Remodelling / Development	1	2	3	4	5
School Self Evaluation	1	2	3	4	5
Ofsted	1	2	3	4	5
HSE Management Standards	1	2	3	4	5

	Yes	No	Not sure
Would you recommend the Well-Being Programme to other schools?			

Would you like to comment further on any aspect of the Worklife Support Well-Being Programme? If so, please feel free to do so here:

THANK YOU FOR CONTRIBUTING YOUR VIEWS

2

APPENDIX 3:
QUESTIONS FOR INTERVIEW WITH KEY LOCAL AUTHORITY CONTACT

1. What visibility does the Well-Being Programme have within the authority? Are those 'at the top' aware of it?

2. Is the wider authority supportive of the programme's aims?

3. In what ways has participation in the Well-Being Programme impacted on the local authority itself – can you think of both strategic and more practical benefits?

4. What steps could be taken in future to increase the impact of the programme within the authority?

5. Has the programme supported your own role in any way? If so, how?

6. What links have been made with other programmes/initiatives/work taking place within the authority?

7. How useful have you found the aggregated OSRM data? How has this data been used within the authority?

8. How did you find the process of recruiting schools onto the Well-Being Programme? Which features of the process might be altered to increase recruitment?

9. What is your perception of the programme's impact within your schools?

10. How and why might the programme be altered in future to increase the impact on schools?

11. Would you recommend the Well-Being Programme to other authorities?

APPENDIX 4:
A BRIEF INTRODUCTION TO SOME
NATIONAL INITIATIVES IN THE EDUCATION SECTOR

EVERY CHILD MATTERS: CHANGE FOR CHILDREN[42]

Every Child Matters is a new governmental approach to the wellbeing of children and young people from birth to age 19. The Government's aim is for every child, whatever their background or their circumstances, to have the support they need to:
- be healthy
- stay safe
- enjoy and achieve
- make a positive contribution
- achieve economic wellbeing

This means that the organisations involved with providing services to children - from hospitals and schools, to police and voluntary groups - will be teaming up in new ways, sharing information and working together, to protect children and young people from harm and help them achieve what they want in life.

INVESTORS IN PEOPLE (IIP)

Investors in People provide an optional 'standard' for all organisations, including schools, to work towards in any way they consider appropriate. Their aim is to improve the performance of an organisation through a focus on its people.

NATIONAL HEALTHY SCHOOL STANDARD (NHSS OR 'HEALTHY SCHOOLS')[43]

The aim of the NHSS is to promote a coherent and holistic message about the importance of a healthy lifestyle. A 'healthy school' promotes physical and emotional health by providing accessible and relevant information and equipping pupils with the skills and attitudes to make informed decisions about their health. It understands the importance of investing in health to assist in raising levels of pupil achievement and improving standards. It also recognises the need to provide both a physical and social environment that is conducive to learning.

REMODELLING AGENDA[44]

The Remodelling Agenda has as its objectives to:
- focus teachers' time and energies on teaching and learning
- re-focus time-consuming, non-teaching activities
- facilitate the use of new technologies to improve efficiency and effectiveness
- assist headteachers and school change teams (SCTs) to optimise the use of resources to meet contractual changes
- learn and share innovative and effective practices within and between schools
- enable schools to deliver solutions to workload issues appropriate to their individual context and circumstances
- encourage school leaders to take control of and lead the change agenda appropriate to its situation, taking account of appropriate Government initiatives

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[42] Source: www.everychildmatters.gov.uk
[43] Source: The Department for Children, Schools and Families (formerly the Department for Education and Skills)
[44] Source: National Remodelling Team, 2004

- quicken the pace of the implementation of the National Agreement, which aims to raise standards and tackle workload

SCHOOL IMPROVEMENT[45]

The School Improvement and Targets Unit of the Department for Children, Schools and Families is responsible for the development and delivery of policies and programmes that "transform schools in challenging circumstances; prevent school failure; tackle failing and underperforming schools; and promote improvements in pupil attainment to narrow attainment gaps". The principal focus of school improvement is on strengthening school leadership, improving teaching standards, working in collaboration with other schools, and engaging parents and the community.

SELF-EVALUATION AND OFSTED

Schools are advised to complete a self-evaluation form (SEF) annually. According to SEF guidelines, this should be an accurate diagnostic document, with all conclusions fully supported by evidence. It should identify key strengths and weaknesses, and what needs to be tackled to effect improvement.

How effectively a school's self-evaluation leads to improvement is a major factor taken into account in Ofsted's judgements about the effectiveness of that school's leadership and management and its capacity to improve in the future.

SOCIAL AND EMOTIONAL ASPECTS OF LEARNING (SEAL) PROGRAMME[46]

SEAL is a comprehensive approach to promoting the social and emotional skills that underpin effective learning, positive behaviour, regular attendance, staff effectiveness and the emotional health and wellbeing of all who learn and work in schools. It proposes that the skills will be most effectively developed by pupils and staff through:
- using a whole-school approach to create the climate and conditions that implicitly promote the skills and allow these to be practised and consolidated
- direct and focused learning opportunities (during tutor time, across the curriculum, in focus groups and outside formal lessons)
- using learning and teaching approaches that support pupils to learn social and emotional skills and consolidate those already learnt
- continuing professional development for the whole staff of a school

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[45] *Source: The Department for Children, Schools and Families (formerly the Department for Education and Skills)*
[46] *Source: SEAL website for secondary schools: http://bandapilot.org.uk*

APPENDIX 5:
EXTRACT FROM 618G DATABASE

Appendix 4: 618G form (cover and absence-data sheets only)

department for
education and skills
creating opportunity, releasing potential, achieving excellence

For schools and Pupil Referral Units

Form 618G 2007 - survey date: 18 January 2007

Important: Please read the completion notes carefully before completing this form.

School name

DFES number

School type (insert relevant number in box)
Nursery = 1
Primary = 2
Mid deemed primary = 3
Mid deemed secondary = 4
Secondary = 5
Special = 6
Pupil Referral Unit = 7

Contact name

Telephone number
(including STD code)

Fax number
(including STD code)

Contact E-mail address

Completion time: Please estimate (to the nearest minute) the total time taken to complete this form.

	School staff
Tables 1 to 8	
Table 9	
Table 10	

Please return this form to:

59

Table 9: Sickness absence *(including unpaid)* **of teachers with permanent contracts or contracts of over 1 month**

Include teachers with and without Qualified Teacher Status (as tables 1A, 1B, and 3A)

Note: in each column row 902 must equal the sum of rows 903 to 905

		Full-time (a)	Part-time (b)
How many teachers have taken sick leave between 1 January 2006 and 31 December 2006? (count multiple absences by the same teacher only once)	901	0	0
How many days sick leave were taken by teachers between 1 January 2006 and 31 December 2006 (on days they were expected to be available for work)?	902	0	0
- how many of these days formed part of absences of 5 working days or less?	903	0	0
- how many of these days formed part of absences of 6 to 20 working days?	904	0	0
- how many of these days formed part of absences of more than 20 working days?	905	0	0

Do not include sickness at weekends or during holidays.
An absence of less than one day should be counted as one day.
Include teachers who took sickness absence during the year, even if they have now left teaching.
Maternity leave should not be counted as sickness absence.
Row 901 a teacher who is absent more than once during the year should be counted once.

Example

Teachers absent on sick leave

7 teachers absent for 1 day each
2 teachers absent for 5 days each
1 teacher absent twice, for 10 days then 21 days

Teachers who have taken sick leave - row 901:   10

Days sick - row 902   48

absences of 5 working days or less - row 903   17
absences of 6 to 20 days - row 904   10
more than 20 days - row 905   21

APPENDIX 6: LOCAL AUTHORITY OBJECTIVES FOR THE WELL-BEING PROGRAMME IN NEWCASTLE UPON TYNE

1) To promote an ethos of staff welfare and wellbeing – demonstrating that "we mean it".

2) To promote Well Being as a means of achieving the following objectives of the Education Development Plan, 2002 – 2007 xx(*Crosscutting Theme 5, Leadership and Management, with a target of Ofsted inspections confirming that leadership (and) management are good or better in 90% of schools*)
- (achieve) self-evaluation, self-determining schools that achieve highly
- (provide) Career and Role pathways for all staff … (Recruitment and Retention)
- (d vi) Review and improve strategies for teacher … recruitment and retention

3) To promote the Well Being of staff as a way of supporting improved achievement, as per the Newcastle School Self Evaluation guidelines xxxx(*School Management: To manage the staff of the school towards the achievement of the challenging targets which the school has set*).

4) To help meet the Workforce Reform agenda of developing staff who are motivated and enthusiastic

5) To establish clear, specific links to Every Child Matters goals – in particular:
Be healthy
Enjoy and achieve
Make a positive contribution

6) Ensure that all participants understand how the Well-Being Programme will contribute to the establishment of a 'Newcastle Schools Healthy Working Lives Strategy' which will:
- take to another level the activities already developed by the Support for School Managers Project
- support the achievement of corporate objectives, such as the adoption of a Stress Management Policy by all schools
- help schools to adopt the Health and Safety Executive Stress Management Standards

7) Worklife Support 'Well-Being Programme' will work in Partnership with Newcastle's unique resource 'Support for School Managers'

8) Investigate any impact on sickness absence.

9) Develop an evaluation of the impact on staff recruitment and retention. Consider adopting the Well Being Programme as a form of promotion for Newcastle as an employer.

It was agreed to measure these objectives by including questionnaire, tracking changes in relevant OSRM statements and direct measurement.

1) Has the Well-Being Programme helped promote a feeling of staff wellbeing? (School questionnaire)

2) Has the Well-Being Programme:

- supported your professional development? (School questionnaire) encouraged staff to remain at the school? (OSRM statement: "There are things about working here that make me want to stay")
- encouraged new staff to join the school? (School questionnaire)

3) Has the Well-Being Programme:
- helped you to work in better ways? (OSRM statement: I feel I am doing a good job)
- enjoy your job more(feel more positive about your job) (OSRM statement: I enjoy my job immensely)
- supported you or your colleagues to work towards the targets that the school has set? (School questionnaire)

4) Feel more positive about the future:
- (OSRM statement: I believe that changes planned for the future will be for the better", and
- (OSRM statement: "Looking ahead the prospects are positive"
- (OSRM statement: "I have the right amount of challenge and pressure to keep me interested and motivated" and

5) Has the Well-Being Programme:
- supported you or your colleagues to work in better ways? (OSRM statement: 7.4 I feel I am doing a good job
- supported you or your colleagues to enjoy your job more(feel more positive about your job) (OSRM statement: 1 I enjoy my job immensely
- supported you or your colleagues to feel more positive about the future (OSRM statement: I believe that changes planned for the future will be for the better", and (OSRM statement: "Looking ahead the prospects are positive"
- supported you or your colleagues to take changes in your stride (feel more positive about change) Se(OSRM statement: We are given the help we need to cope with the effects of change
- supported the wellbeing of pupils (School questionnaire)
- helped pupils to enjoy school more? (School questionnaire)
- had an impact on pupil behaviour? (School questionnaire)

6) Has the Well-Being Programme raised the profile of SfSM? (School questionnaire)

7) To be assessed quantitatively

8) To be assessed quantitatively

APPENDIX 7:
CASE STUDIES FOR THE WELL-BEING PROGRAMME

CASE STUDY: ASHFIELD NURSERY SCHOOL, NEWCASTLE UPON TYNE

Organisation type: Nursery school
Headteacher name: Anne Stoker
Stage of programme: Started their second phase in February 2007
Number of staff: 20 (FTE: 19.9)
Number of pupils: 89
Focus of case study: The challenge of improving an already high Well-Being rating

Contextual information

Ashfield Nursery School serves part of the west end of Newcastle, areas of which have high levels of deprivation. A large proportion of the children are eligible for free school meals. The starting point of many of the school's pupils on beginning nursery is much lower than the average for their age and 46% of pupils learn English as a foreign language.

The school's partnership with parents and links with the wider community are excellent and the school is valued within the community. It has developed a Parents' Centre offering a wide range of courses that enable parents to develop their own skills and support their children's learning. Relationships in the school are very good and staff provide a high level of care and support to the children and their families. The school was rated 'outstanding' in a recent Ofsted inspection (July 2007).

Ashfield Nursery clearly had a high level of wellbeing before joining the Well-Being Programme. Staff rated every section in their first Organisational Self-Review Measure (OSRM survey) above 4 on the 1-5 scale, giving the school an overall Well-Being rating of 4.22. This sits at the top of the normative range for nursery schools in England.

The headteacher, Anne, and facilitator, Susan, were pleased - though not surprised - that staff wellbeing was found to be so high at Ashfield. Their OSRM data confirmed the school's own self-evaluation in relation to organisational strengths and areas for potential development, but they found the additional information regarding demographic groups useful. Whilst staff were already willing to share their views, the formal identification of development priorities was also helpful.

Since they started from such a high baseline, it seemed rather a challenge for Ashfield staff to improve their wellbeing even further.

The process to date

Anne and Susan worked closely throughout the year. They felt there was no pressure associated with the Well-Being Programme, which enabled the school to progress at its own pace. Staff were very supportive and readily took personal responsibility for their own and their colleagues' wellbeing and Susan describes the programme as having been "fun" rather than a burden.

The staff chose to carry out further work on an existing focus in the school: that of 'communication'. They also decided to focus on the area of 'personal wellbeing and worklife balance' because, although the staff had rated this section highly in comparison to other nursery schools, it was the lowest rated section in Ashfield's survey.

The outcomes to date

The school has created closer links between teams by encouraging whole-staff discussions and introducing some mixing of teams.

All classes are now connected by email.

Staff have improved their personal wellbeing by attending 'pamper sessions' at nearby Newcastle College following the Wednesday afternoon staff meeting.

The school now facilitates a weekly, on-site ironing service for staff. Susan says that she uses the extra time that this has freed up to enjoy an additional night out.

Both Ann and Susan feel that the OSRM raised awareness of the factors important for wellbeing and that the programme provided a focus for a progress. After the first year of their programme, Ashfield's overall Well-Being rating rose to an impressive 4.60.

The future

The school's aim is that, in time, every member of staff will feel that they have benefited individually from new activities and/or changes in processes.

CASE STUDY: ST MICHAEL'S RC PRIMARY SCHOOL, NEWCASTLE UPON TYNE

Organisation type:	Primary school with nursery class
Headteacher name:	Margaret Kerridge
Stage of programme:	Started their second phase in July 2007
Number of staff:	23 (FTE: 18.1)
Number of pupils:	213
Focus of case study:	Reinforcement of wellbeing strengths, with a particular focus on the imaginative feedback of the survey data to staff

Summary

- St Michael's RC is an average-sized primary school participating in the Newcastle Well-Being Programme, the initial phase of which was part-funded by the HSE
- Staff wellbeing was already high on the agenda when the school joined the Well-Being Programme; the headteacher was interested in undertaking the staff audit and creating a structured 'wellbeing' framework to support existing activities
- The imaginative way in which the facilitator fed the survey outcomes back to staff may be of particular interest to other Well-Being schools

Contextual information

St Michael's is an average-sized Roman Catholic primary school that serves an area of high social and economic deprivation in Newcastle upon Tyne. This is reflected in the well-above-average proportion of pupils eligible for free school meals. Approximately 10% of pupils are at an early stage of learning to speak English.

Against this background, staff have worked hard to create "a good school in which pupils achieve consistently well from their very low starting points in the nursery". "Pupils' personal development and wellbeing, including spiritual, moral, social and cultural development, are good" (Ofsted July 2007).

The headteacher, Margaret Kerridge, is a strong advocate of wellbeing both within the school and the local authority – she supported the setting up and development of the local authority's 'Support for School Managers' programme. Margaret took St Michael's into Worklife Support's Well-Being Programme to:

- underpin the existing focus on staff wellbeing
- further strengthen the school's culture and ethos
- support staff relationships and team working
- create more personal and professional development opportunities

The process to date

St Michael's first Organisational Self-Review Measure (OSRM) had a response rate of 73%. The overall Well-Being rating was 3.55. The outcomes confirmed that staff felt supported, valued and treated with dignity and respect. Relationships were a particular strength and there was a perception that all staff 'give their best' and 'help and encourage one another to do a good job'.

The facilitator, Kelly, considered the wealth of statistical information in the school's data profile and the need to feed back to colleagues in a way that helped them to make an informed decision about the focus of their programme without confusing or boring them with lots of data. She hit on the idea of using her expertise in ICT to bring to life what the staff felt they did well.

Kelly took photographs of her colleagues engaged in activities related to the top 10 statements from the OSRM and incorporated the pictures into a PowerPoint presentation. She substituted

uplifting background music for the dialogue normally associated with presentations. By condensing explanations into photographs and eliminating 'number crunching', Kelly reduced the time taken to feed back the outcomes.

This technique of focusing on what is already good (sometimes called 'appreciative inquiry') is highly motivating and can lead to positive behaviour in other, seemingly unrelated, areas. Staff at St Michael's, who still had access to the data profile, were very receptive to the presentation's emotionally powerful messages and subsequently felt able to take ownership of their programme and make collective decisions concerning its future direction and pace. The feedback set a positive tone for the whole Well-Being Programme.

The outcomes to date

Relationships: The staff decided to focus on 'relationships', a particular strength in the school, with a view to teasing out what they were doing well and developing these positive behaviours. Each individual was encouraged to consider the aspects of his or her own behaviour that contributed to the successful relationships that he or she enjoyed. Activities that took place throughout the year built on the strength of existing relationships to further integrate staff in year groups and support staff in "rediscovering the excitement of teaching".

Communication: Work also took place around the theme of 'communication'. Staff drew a 'mind map' of how they might develop communication further in school. A number of changes have already been made.

Survey rating: St Michael's have recently completed their second OSRM and were delighted with the findings. Their overall Well-Being rating rose to 3.62.

The future
St Michael's have many plans for the future of their Well-Being Programme. These include:
- ongoing team-building activities, which will continue in the long term. Margaret, the headteacher, would like to hold a staff day outside school
- creation of more noticeboard space, including room for social and 'wellbeing' activities
- making training and ongoing support in stress management available for all staff to help avoid individuals reaching a point where they are in real difficulty or have to take sickness absence

CASE STUDY: HYDE HEATH INFANT SCHOOL, BUCKINGHAMSHIRE

Organisation type: Infant school
Headteacher name: Julie Moulsdale
Stage of programme: Started their second phase in March 2007
Number of staff: 15 (FTE: 6.5)
Number of pupils: 53
Focus of case study: A very small school working to improve their wellbeing from an already high level

Summary

- The school regularly allocates meeting time to discuss issues with the whole staff and works hard to respond to any solutions and suggestions offered
- 'Stress-busting' meetings have identified specific issues and effective responses to these issues
- There is shared acknowledgement of the issues that affect staff wellbeing and a determination to do something about it
- The positive perceptions identified through the first survey improved still further in the second survey

Contextual information

Hyde Heath Infant School is a very small infant school situated in the village of Hyde Heath, an area of socio-economic advantage. The vast majority of the 55 pupils are of white British origin and live near to the school. A small number of pupils are from other backgrounds, including mixed heritage and European backgrounds.

Hyde Heath joined the Well-Being Programme in Buckinghamshire as part of a joint Worklife Support/Health and Safety Executive (HSE) research project. The programme was part-funded by the HSE and grants available to Buckinghamshire.

The headteacher, who has been in post for three years, describes Hyde Heath as a "*very happy environment*". The school's latest OFSTED report identified that "*relationships are very good across the school and with parents and the local community… The school's positive ethos underpins every aspect of its work and ensures that the pupils enjoy learning… The school is highly consultative*."

Hyde Heath joined the Well-Being Programme to support their work with Workforce Reform and to complement the Buckinghamshire Healthy Schools initiative. A programme that would support the needs of staff effectively meshed their work together.

The school has recently acquired Quality Mark and Healthy Schools status.

The process to date

Staff completed their first Organisational Self-Review Measure (OSRM) in April 2006. They felt reassured by their overall Well-Being rating of 4.19 and the positive ratings across the survey.

The survey did raise some issues regarding perceptions of stress, job resources, communication and the physical environment.

Staff meetings were held to discuss the issues and identify possible solutions:

- In order to respond to the issues around perceptions of stress, staff meetings were held using activities from the *Working for wellbeing* workbook supplied as part of the Well Being Programme
- Further staff meetings led by an educational psychologist (also a governor) were held to identify sources of stress and techniques to overcome them. As part of this process, staff completed a questionnaire about stressful times they experienced and were offered relaxation techniques that might help them overcome them

Local facilitator network meetings were described as "*great for the sharing of problems and finding possible solutions… They help you to keep an eye on the wider world. You just can't live in your own school. We'd have lost our focus, but having the meetings kept us on track.*"

The outcomes to date
Following the initial survey:
- Staff identified a 'wish list' of resources to be purchased
- Strategies for improved communication were implemented, including ensuring that staff-meeting minutes were published and circulated to all staff groups
- The survey provided an additional impetus to begin building work to construct a new staffroom, which had already been identified as a need
- Work with the educational psychologist identified a common staff view about the need for more physical exercise, leading to the setting up of a weekly staff pilates class after school
- Lunchtime staffing levels were increased and attention is being paid to the training needs of midday supervisors and teaching assistants

When the school undertook a second survey in March 2007, the ratings had improved even further. Not only had the overall Well-Being rating risen to 4.4 but the statement 'All in all the quality of my life is very good' improved by an incredible 10% to 4.7.

The programme is widely perceived to have given staff wellbeing a much higher profile and improved understanding of why and how things are done. When it was suggested, for example, that governors' meetings started earlier, there was genuine understanding of the reasons behind this and therefore agreement with it.

Of course, some concerns remain – mainly around stress, workload, the physical environment and the need to acknowledge achievements and recognise everyone's contributions. And brainstorming and action are ongoing. As just one example, in order to acknowledge staff achievements as well as those of the pupils, the school organised and coordinated a number of activities (including a visit from the WASPS rugby club with the Heineken Cup) into a celebration day where the whole school and the local community celebrated many things about the school - not least their achievement of Quality Mark and Healthy School status.

The headteacher feels confident that the programme "*gives you a vehicle through which to discuss things. It gives you permission. We are always focused on the children and if you are not careful you can forget about the staff… We have had so many really good conversations as a staff, which have resulted in lots of small things happening – but together they have made a big difference… And this is not just the teachers; the whole staff has a voice.*"

The future

According to the headteacher of Hyde Heath, "*Each school or organisation is different and will tackle their issues in different ways. The Well-Being Programme's survey helps to highlight some problems that you are probably already aware of, but it can also provide some surprises. In our experience, involvement in the Well-Being Programme is really worthwhile and we, as a school, wish to continue with it… The process is ongoing. You can't solve everything, but the programme keeps up the momentum and provides the motivation to push ahead.*"

CASE STUDY: QUARRENDON SCHOOL, BUCKINGHAMSHIRE

Organisation type: Secondary school
Headteacher name: Jonathan Johnson
Stage of programme: Started their second phase in June 2007
Number of staff: 95 (FTE: 80.8)
Number of pupils: 765
Focus of case study: Successes of a secondary school in challenging circumstances

Summary

A secondary school in challenging circumstances took part in the Well-Being Programme and experienced improvements between its first and second survey.

The school took the approach of integrating the outcomes from its initial survey and subsequent staff discussions into the school's strategic plan, thereby ensuring that actions arising from the programme were directly seen as success criteria. By rooting wellbeing activity within the school's wider strategic vision, the school avoided the programme being sidelined as 'just another initiative'.

Contextual information

Quarrendon School is a mixed, non-selective secondary school serving a local community with some social and economic disadvantage. The proportion of students eligible for free school meals is higher than average. The school is smaller than average, with sixth-form provision provided through the local sixth-form consortium. The proportion of students from minority-ethnic groups is above average, as is the number of students with learning difficulties and disabilities and the number of students with a statement of special educational need (SEN). Attainment on entry has been well below average for a number of years. The school is part of the Aylesbury Vale Leading Edge Partnership.

Quarrendon has been judged to require 'special measures' twice in the last three years, but was removed from this OFSTED category in 2006. OFSTED judge that many aspects of the school's accommodation do, however, remain sub-standard.

The school joined the Well-Being Programme in January 2006 during a time of significant recruitment and retention problems. Staff turnover was high and the new headteacher felt there was no coherent programme for addressing the worklife balance issues that the staff experienced given the very challenging nature of the school's environment.

The process to date

The school undertook its first survey in the summer of 2006. The headteacher reports that staff were initially sceptical because the programme was feared to be 'yet another initiative' that might not lead to anything worthwhile, which would make it a complete waste of time.

Although the focus of getting out of special measures clearly hinged on the quality of teaching and learning and that of assessment, staff were perhaps more concerned that the photocopier would work and that they could get a cup of tea and a shoulder to cry on when needed.

The reaction to the programme was typical of a school in Special Measures: only 60% of staff responded to the first survey and 57% to the second survey.

The outcomes to date

The key issues arising from the initial survey concerned feeling valued, communication, a sense of vision and provision of support. The impact of being in Special Measures was clearly reflected in staff responses in the survey. However, staff were optimistic that the changes planned for the future would be for the better. At the time, the school's key priority was to be removed from Special Measures, therefore activity was focused on that objective.

The key priorities and actions from the survey were included in the school's strategic plan, with the actions forming the success criteria for the plan. The school was keen to ensure that the Well-Being Programme was not a 'bolt-on' activity, but integral to the way the school operated.

As headteacher Jonathan Johnson reflects, "*We didn't actually do anything under the banner of 'wellbeing', but instead had our sights firmly fixed on school improvement. Any wellbeing issues that were addressed were seen as a by-product of this process rather than the principal focus. One problem we encountered was the size of the Well-Being team: four facilitators in a staff of 100 is way too few – the team really needs to be about 10 in number*."

The facilitators report a wide range of activities taking place in the school. Improvements have come about in staff wellbeing not only through organisational and communication changes, but also by finding opportunities for teams to link together socially as well as through the curriculum.

The follow-up survey saw an increase in ratings from 3.22 to 3.38 – in line with the national average rating for a secondary school on the Well-Being Programme.

The main issues arising through the second survey show that staff priorities have shifted. Whilst improving communication and links between different staff groups still remain in the top priorities, the need to address the physical environment has become more pressing. On the positive side, staff feel they are working in a more stable and secure environment and are much more confident that everyone gives their best.

There are now plans to establish a staff committee that will deal with all things relating to staff wellbeing and effectiveness – ranging from providing basic information to new staff along the lines of 'Where's my class?', 'How do I get keys?' and 'Where's the photocopier?' right through to full staff consultation.

Jonathan Johnson feels Quarrendon's experience proves it is "*possible to address issues of staff wellbeing as part and parcel of what we do everyday, rather than by making a conscious effort to allocate it a specific period of time as part of some specific 'wellbeing action plan'. The priorities we now have can only be achieved through increasing the size of the wellbeing team*".

The future

The headteacher concludes, "*We have subscribed to the programme for a third year in the belief that with an expanded team of facilitators, the impact will be greater and more evident. We also believe the programme will be most effective if our focus for decisions is rooted firmly within the wider vision of the school, knowing that there will be by-products associated with staff wellbeing, rather than focussing on staff wellbeing alone as a separate initiative*".

CASE STUDY: THE OAKS PUPIL REFERRAL UNIT, BUCKINGHAMSHIRE

Organisation type: Pupil referral unit
Headteacher name: Cathy Kirkham
Stage of programme: Started their second phase in June 2007
Number of staff: 10 (FTE: 6.8)
Number of pupils: 24
Focus of case study: Significant improvement in Well-Being ratings

Summary

- A new headteacher wanted to use the Well-Being Programme as a formal vehicle for staff to express their opinions and suggestions
- Resulting improvements to the physical environment made a significant difference to staff wellbeing
- Overall Well-Being ratings increased from 3.60 to 4.28 over the first phase of the programme

Contextual information

The Oaks Pupil Referral Unit supports children with social, emotional and behavioural difficulties. It is situated in the grounds of a junior school and services all the primary schools in the Chiltern and South Bucks area of Buckinghamshire. The majority of pupils are boys and from socially deprived backgrounds. A high proportion come from dysfunctional families and have experienced severe loss in their lives. All the pupils have special educational needs. The unit was awarded Healthy School status just before its OFSTED inspection in November 2005.

According to the school's latest OSTED report, "*the specialised nature of the unit's work means that it depends on staff having a very particular set of skills… the unit fulfils a highly specialised role exceptionally well. It gives extremely good value for money… No significant points for improvement were identified…Teamwork between the staff is seamless…*".

Taking part in the Well-Being Programme coincided with a time of change for the school. There was a new headteacher in post and the first survey took place in the midst of staff restructuring, which had an unsettling effect on some staff.

The headteacher wanted a vehicle for staff to express concerns, which could then be addressed formally. She saw it as the start of an open dialogue for all staff members.

The PRU has just been revalidated as a Healthy School and gained International Status.

The process to date

Staff completed their first Organisational Self-Review Measure (OSRM) in May 2006. The survey raised issues around perceptions of communication, how different teams worked and planned together, change management and opportunities for taking breaks.

Staff meetings were held to discuss the main issues and identify strategies for improvement that involved everyone. A strong theme in these discussions was the need for personal responsibility, as well as a commitment from the organisation, in order to bring about change.

The unit's facilitator, Liz Ellis, regularly attended networking sessions with other Well-Being facilitators. She welcomed "some good suggestions from other schools".

When the school undertook a second survey in June 2007, the overall rating had improved from 3.60 to 4.28 – with an average 19% improvement across all sections.

The outcomes to date

Planned changes to the physical environment had a significant effect on staff in the unit. The headteacher and facilitator have reported that the improvements were "*universally acclaimed, bringing extra daylight and an open aspect, which helped everyone feel better about being in the building. The lighting was changed as well as the staffroom and the kitchen and a 'quiet room' was created. This all helped in the day-to-day running of the PRU*."

In addition:
- Two teams were brought together as a result of the Well-Being Programme
- Working patterns were altered to get many staff working together
- The nature of the unit's working environment means that many staff don't normally have a chance to meet up in the staffroom. Following Well-Being discussions, the unit organised 'Well-Being afternoons' – a time to be together as people. The Well-Being team also arranged tea, cakes and time before certain staff meetings
- Notice boards were put up for staff
- Each member of staff was given a private locker for their own things
- An effort was made to acknowledge staff as individuals in small, regular ways
- The outreach team now come into the unit, which helps them gel together as a team
- The head planned several all-staff projects and feels there is a strong feeling of everyone being consulted and working together towards the same goals
- A 'staff rotation' system was established to ease the burden of meetings, and meeting minutes are now produced

One change that was initiated in response to the survey outcomes was not found to be successful, as the head reports: "*We put in a rota of breaks for all staff… but it did not get used. Whilst it enabled staff to take a break, it required an element of isolation and staff preferred not to have that.*"

The head's perception of the programme: "*I am thrilled! The changes have been wonderful. The difference is just amazing – a happier lighter atmosphere, with positive comments from everyone which gives us good feedback. We now have team players who are willing to take responsibility when it's necessary.*"

Ratings in all survey sections improved between Phase 1 and Phase 2 of the programme, with only six statements in the whole survey receiving ratings below 4.0.

The future

The unit feels strongly that the Well-Being Programme gives all staff groups a formal place to talk about any issues that arise and intends to remain within the programme. There is a general recognition that there will always be things that require attention – if only to maintain the current positive position.

Implementation of Worklife Support's Well-Being Programme in the local authority-controlled education sector

This study is a report of a five-step risk-assessment approach, using Worklife Support's Well-Being Programme, in two public-sector organisations.

The broad aims of the project were two-fold:

■ To introduce an approach broadly equivalent to that of the Health and Safety Executive (HSE) Management Standards in the education sector in order to raise awareness of the areas covered by the Management Standards for Work-Related Stress.
■ To demonstrate how this approach could have an impact on organisational wellbeing.

In schools, the Well-Being Programme has been shown to offer an effective risk assessment for stress. According to the end-of-programme school evaluation questionnaire, it has:

■ raised awareness of the HSE Management Standards;
■ raised awareness of factors that affect staff wellbeing;
■ supported staff to take personal responsibility for their own wellbeing;
■ encouraged an atmosphere in which staff groups feel able to contribute to the promotion of wellbeing.

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